

# Member Service Representative - Bilingual

Enjoy a career with purpose while making a difference in the lives of others. At **Point West Credit Union** we champion a diverse culture, pride ourselves on stellar member service, and are enthusiastic for creative, fresh ideas that benefit the cooperative. We believe that with a positive attitude, we create opportunities for both our members and our teammates to grow and thrive.

Monday – Thursday 8:30 a.m. – 5:30 p.m., Friday 8:30 a.m. – 6:30 p.m. Occasional evening or weekend teamwork. Schedule may vary, must be flexible.

Point West Credit Union is looking for a dynamic bilingual Spanish / English speaking candidate for our *\* Member Services Representative role, in our Remote Branch.\**

Use your customer service expertise to consult with members to identify their individual needs and provide solutions that are in the best financial interest of the member. If this is what the next steps in your career look like – we want to hear from you!

- You value your personal achievements and working with a team toward success
- You value building strong relationships
- You have ambition to excel in your career
- You take pleasure in working with a company that values the highest level of integrity and ethics

We are looking for someone who has the ability to:

- Establish meaningful relationships with members
- Use trust and respect to deepen these relationships
- Maintain personal accountability in relation to the team's and branch's goals
- Collaborate with managers and team members for the branch's sales strategy
- Participate in community events

## The job:

- Receive and processes members financial transactions via mail and phone, including deposits, transfers and loan payments, cashier's checks, wires, etc. Balances cash drawer and accurately settles and records all daily activities.
- Assist members and potential members with opening, maintaining and closing accounts, answer questions about products and services (including debit and credit cards), and resolve member issues that are within their authority to resolve via phone and mail. Refer problems that are beyond their authority to the Branch Manager. Develop to identify cross-selling opportunities with the ability to speak to and cross-sell relevant PWCU's products and services to members.
- Perform a variety of miscellaneous duties including filing, project work, computer input, handling of incoming and outgoing mail, and other job-related duties as required or assigned.
- Correspond with or interview new account and/or loan applicants; collect necessary documents for approval and processing in compliance with Credit Union procedures, policies and legal requirements. Answer phone calls and respond to general account and/or loan questions, calculate payments, and take loan applications over the phone from members and potential members.

## PHYSICAL/MENTAL DEMANDS:

(Physical demands)

- Continuous sitting for extended period when performing duties.
- Occasional standing and walking.
- Occasional lifting up to 35 lbs. (office supplies).
- Occasional bending, squatting, or reaching at ground level.
- Frequent use of hands in repetitive tasks such as simple grasping, twisting/turning of wrists; finger dexterity.
- Continuous speaking and hearing for interaction with staff, members, and outside contacts.
- Continuous ability to see close and at a distance.

(Mental demands)

- Continuous interaction with others, repetitive work, attention to detail, ability to solve complex problems, alertness, precision, concentration, accuracy, thoroughness, and memory demands.
- Occasional fast-paced work.
- Frequent deadlines, flexibility, performing basic and complex numeric calculations, writing, reading, comparing, analyzing, judgment, reasoning, patience and negotiating.

## WORKING CONDITIONS:

- Continuous operation of office equipment.
- Normal 40-hour workweek, with occasional overtime (when approved by a manager).
- Exposed to a potentially hazardous condition, i.e. robbery. Receives detailed instructions and procedures to be followed to minimize the risk.

The physical/mental demands and work environment characteristics described above are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Join **Point West** as we work toward maintaining a strong, trust-based community in our Credit Union with our customers, and in our communities.

**"The culture here at PWCU really is like no other company. From how we're committed to serving our community, to how we're treated as employees. I'm lucky to be able to be a part a diverse mission driven organization. Every day brings forward new experiences and proof of what makes this such a special place to work." - Sade Garcia, Retail Branch Manager**

**To see our open position descriptions and to apply, please visit our career page at <https://www.pointwestcu.com/careers/> Cover letter and application are required to be considered for the position.**

Job Type: Full-time

Salary: Starting at \$15.00 /hour, Competitive based on experience

