

Member Service Representative II

Summary

Member Service Representative II actively engages with Members and Non-Members of Aventa Credit Union, and takes a lead role in MSR duties in helping to meet the needs of the Member while actively supporting and helping to achieve goals and initiatives set for the Branch and Department. Assists branch management team in dual control and oversight in processes of greater complexity. Adheres to the GREAT Culture of Aventa Credit Union and support in the delivery of service as set by this standard

Essential Duties and Responsibilities include but not limited to the following. Other duties may be assigned:

Performs all essential duties of the Member Service Representative-I position which include:

1. Maintain and develop applicable understanding of Aventa's products and services, policies, procedures, and processes
 2. Recognize Member needs by identifying solution-based cross-sell opportunities in alignment to goals set
 3. Open, maintain, and close accounts to include additional, or sub-products, in accordance to applicable procedures
 4. Assists in the onboarding of New Members
 5. Maintain a cash drawer and handle negotiable and non-negotiable instruments as defined by Aventa Policies and Procedures
 6. Properly handle Member and Shared Branch Member requests and transactions including, but not limited to, the following:
 - a. ACH (Automated Clearing House) updates, additions, or cancellations
 - b. Cash Advance / Line of Credit Advance
 - c. Cashier's Check Creation
 - d. Check Cashing
 - e. Deposits
 - f. History/Statement Printouts
 - g. Internal Funds Transfers
 - h. Loan Payments
 - i. Shared Branch (Co-Op) Transactions
 - j. Withdrawals
 7. Conduct basic IRA and Health Savings Account transactions, including contributions and withdrawals
 8. Assist in providing and saving Outgoing Wire Request forms for Members
 9. Complete Non-Member Check cashing, following applicable OFAC Guidelines
 10. Verify proper Member and Non-Member identification in accordance to Customer Identification Program (CIP) requirements
 11. Read, understand, and applicably adhere to messages placed on accounts
 12. Properly obtain, save, and label documents for Imaging and processing
 13. Maintain positive relationships with additional departments and effectively communicate, when needed, to meet the needs of the Member identified
 14. Assists in basic trouble-shooting and question resolution for Members, or ensure they are directed properly to the department or associate that can further assist
 15. Assist in daily processes, in a supportive role, in the following areas:
 16. Night Depository
 - k. Mail Deposits
 - l. Safe Deposit Box Access
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m. Safe Deposit Box Opening and Closing

17. Understands and is able to utilize DocuSign to capture Member information and signatures electronically
18. Assist in the support of the overall safety and soundness of Aventa Credit Union

Performs all essential duties of the Member Service Representative-II position which include:

1. Provides support to the branch management team.
2. Assists in the opening and closing of branches in support of the branch management team
3. Assists as a dual control function, and back up to the branch management team, in the following processes:
 - a. ATM Balancing
 - b. ATM Replenishment
 - c. Cash Buy/Sell functions
 - d. Vault Sheet and Balancing
4. Assists in processing Notices, such as Opt-in updates, received electronically by Members as a part of the Notices Team
5. Provides enhanced support in recognizing Member needs, troubleshooting, and fulfillment of complex questions that arise from Member, or Non-Member, interactions
6. Provides support to branch management team in branch-related training and onboarding of new associates
7. Assists in printing Instant Issue cards and supporting branch management in daily inventory of Instant Issue cards
8. Assists in identifying and resolving balancing and transaction errors
9. Provides support to branch management in the daily verification of drawers bought and sold to/from the vault
10. Assist in opening and closing Shared Branch (Co-op) Services for the day
11. Assist in opening and closing IRA and Health Savings Accounts
12. Assist in check ordering for Members
13. Assists in sending and receiving fax and email correspondence to meet credit union needs
14. Actively recommend holds and be able to identify potential fraudulent transactions
15. Assist in the support of the overall safety and soundness of Aventa Credit Union

Training/Educational Responsibilities

Will attend all required regulatory training sessions to include but not limited to: BSA/OFAC; CTR & SAR; I.T. Security, Robbery training. There may be additional training for regulatory compliance as necessary for the position.

Continued education for professional development may/will be assigned.

Supervisory Responsibilities

This job has no direct supervisory responsibilities, but actively supports the branch management team in initiatives set

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations.

Member Service - Manages difficult or emotional member situations; Responds promptly to member needs; Solicits member feedback to improve service; Responds to requests for service and assistance; Meets commitments.

Interpersonal Skills - Focuses on solving conflict; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control;

Teamwork - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; supports organization's goals and values.

Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions.

Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience - High school diploma or general education degree (GED); or one to six months related experience and/or training; or equivalent combination of education and experience.

Language Skills

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and policies & procedure manuals. Ability to write routine reports and correspondence. Must be able to speak to the membership regarding their accounts and maintain positive communication among fellow associates

Mathematical Skills - Ability to calculate figures and amounts and basic mathematical equations as applied to financial services

Reasoning Ability - Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

Computer Skills - The Associate should have basic knowledge of the platforms, software and/or applications to successfully perform this job

Physical Demands

The physical demands described here are representative of those that must be met by an Associate to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Associate must have the ability to drive own vehicle or corporate vehicle.

While performing the duties of this Job, the Associate is regularly required to stand; reach with hands and arms and talk or hear. The Associate is frequently required to walk; sit and use hands to finger, handle, or feel. The Associate must regularly lift and /or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision and ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Travel Requirements (Please note travel requirements are required for the SLV Region & select positions)

Some travel to Pueblo/Colorado Springs/San Luis Valley may be required.

Disclaimer

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

Aventa offers an excellent benefit package that includes medical and dental with low deductibles, vision insurance, long term and short-term disability, life insurance, 401 (k), flex spending and a variety of optional products (subject to change).

Salary Range: \$16.50-\$18.50 per hour

If you meet these requirements and are interested in this position, please submit your resume, cover letter to hr@aventa.com or fax (719) 213-2100. Please no phone calls. Apply now to work in a dynamic team environment.
