



## JOB DESCRIPTION

**Position Title:** Member Service Advisor (MSA)  
**Location:** Brockport, NY

### **General Summary:**

Position is part of the Member Services team, serving as primary contact between Reliant and members/potential members in both a Member Service Representative (MSR) and Teller capacity as service needs require in various branch locations as directed. Works with members daily to meet their financial needs and service expectations. Demonstrates the ability to process members' requests in a timely, efficient, and accurate manner. Is instrumental in promoting a quality sales and service environment at Reliant. Demonstrates the attributes of a team player within all branches.

Provides quality service and strives to consistently exceed service expectations. Completes work in a timely and accurate manner. Acts in a professional, friendly manner at all times. Demonstrates the attributes of the ART standards; accountability, respect, and teamwork on a daily basis. Demonstrates a positive outlook and consistently performs within the context of Reliant's philosophy, mission and corporate culture.

### **Duties & Responsibilities:**

*The following duties and responsibilities for this position are not all inclusive; others may be required or assigned.*

1. \*Actively promotes Reliant throughout the retail store and in the community, interacting with customers, store employees and community members to build rapport, develop connections, understand their financial needs and be able to serve them.
2. \*Perform routine member transactions in a professional, confidential, and accurate manner. Open new accounts, acquire proper documentation, and establish desired services. Provide effective demonstrations to members on all automated/electronic services. Interpret system data and reports to provide members with account status and transaction history.
3. \*Provide routine information and explain credit union services, including eligibility for membership, types of credit union accounts, remote services, fee structure, loan interest rates, dividend rates, branch office information, and federal share insurance coverage.
4. \*Assure a full range of Reliant products and services are provided to members within the context of Reliant's sales and service culture. Actively discuss and refer Reliant's products and services with members and potential members. Identify ways to improve members' financial lives by saving them time and/or money.
5. \*Respond to members' requests, problems, concerns and/or direct them to the proper person for specific information, assistance, and problem resolution.
6. \*Safeguard Reliant and our members from fraud and identity theft. Examine checks for proper endorsement and negotiability. Follow Reliant's check cashing, hold, and member identification procedures.
7. \*Attend and participate in branch meetings to keep informed to perform job responsibilities effectively.
8. Perform routine clerical duties as assigned and in accordance with established written procedures (including auditing loans, filing, cracking coin, etc.).
9. \*Follow established security procedures at all times.

10. \*Develop member connections and increase member loyalty. Conduct regular new account follow up calls, teller referral follow up calls, utilize established cross-sell methods, and promote and open core products such as checking, direct deposit, and bill pay.
11. \*Conduct outbound telephone calls to acquire additional member business and enhance service quality.
12. \*Utilize credit skills of interviewing and accepting loan applications. Understand lending and credit decision process. Effectively discuss various lending services to sell credit products and build member relationships.
13. \*Counsel members on appropriate use of their accounts in order to avoid unnecessary overdraft fees. Actively place phone calls to members who are overdrawn to make payment arrangements and document all discussions with members.
14. \*Take ownership of situations such as loan closings, loan follow up, etc., and communicate the outcome to the appropriate individual.

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*\*Indicates an essential function of this position.*

### **Required Knowledge, Skills and Abilities:**

1. Excellent oral and written communication skills, with ability to communicate effectively by email, telephone, and in person.
2. Ability to problem solve effectively. Demonstrate sound judgment, trustworthiness, and patience while handling members' transactions and answering staff questions. Understand and value the importance of confidentiality.
3. Strong planning and organizational skills, with ability to prioritize and meet deadlines.
4. Strong personal computer skills; familiarity with Microsoft Office Suite preferred.
5. Strong sales skills.
6. Ability to work independently as well as with a team.
7. Working knowledge of financial services from a sales, service and compliance perspective.
8. Ability to work in a fast-paced, high volume environment, requiring frequent travel to branch offices for training and coverage.
9. Ability to work a flexible schedule including evenings, Saturdays, and Sundays.

### **Minimum Training and Experience:**

1. High school diploma required.
2. At least 1 to 3 years of related experience in financial services and/or retail environment is desirable. Customer service, sales, and cash handling experience preferred.
3. Thorough knowledge of financial products and services such as deposit products, loan products, IRA accounts, and remote services highly desirable.

### **Physical Requirements**

1. Ability to lift and move a minimum of 20 lbs.
2. Ability to use keyboard, monitor, telephone, and other standard office equipment.
3. Ability to speak and hear on telephone.
4. Ability to communicate effectively with others in person and via telephone, email, and written documents.
5. Ability to decipher data contained in documents, reports, spreadsheets, etc., presented both on paper and electronically. Ability to read fine print.
6. Ability to transport self within the credit union's geographic service area, with a valid NY State driver's license.

**To Apply:**

Email or mail your resume and cover letter to:

careers@reliantcu.com

Attn: Careers  
10 Benton Place  
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