



POSITION TITLE: Financial Guru
WAGE GRADE: 3 & 4
REPORTS TO: Director of Financial Literacy
SUPERVISES: None
FLSA STATUS: Non-Exempt
PREPARED: July 20, 2010

RESPONSIBILITY AND AUTHORITY:

Serves as a liaison between the member and the credit union. Responsible for providing account information, opening new accounts, and professionally handling members' daily credit union needs. Provide a variety of transaction services to members.

JOB DUTIES:

1. Represent the credit union to members in a courteous and professional manner and provide prompt, efficient, and accurate service in the processing of transactions.
2. Provide in-person and by-telephone general and specific service-related information concerning credit union services or policies.
3. Respond to members' requests, problems, and complaints and/or direct them to the proper person for specific information and assistance.
4. Open new accounts, and service existing accounts. Set up new account files, and provide members with all necessary information for membership.
5. Cross sell credit union products and services.
6. Work with the Young & Free Alabama spokesperson by representing Listerhill at events, providing insight into Gen Y, generating ideas and helping with the Young & Free Alabama program
7. Handle requests from members for transfers of shares to loan payments, share withdrawals, check orders, line of credit advances, stop payments, and any other requests received from members.
8. Provide information on investment alternatives to members wishing to deposit funds with the credit union.
9. Assist members with account problems. Research accounts for deposit, withdrawal, and loan-payment discrepancies.
10. Assist members in balancing their accounts.
11. Assist members with the proper completion of payroll deduction and direct deposit cards.
12. Assist members in opening individual retirement accounts.
13. Process, close, and disburse consumer loans and home equity advances.
14. Assist members with car values and pay off information.

15. Prepare monthly reports.
16. Orders vault cash.
17. Performs teller work as needed. Includes balancing cash drawer at the end of the shift and comparing totals to computer generated proof sheet.
18. Provide members with notary service.
19. Other duties as assigned.

Qualifications:

- High School graduate or equivalent
- Minimum of 6 months experience in customer service related industry.
- Must possess a professional demeanor and personality conducive to sales and service culture. (This qualification will be measured by validated testing.)
- Must communicate well orally and in writing.
- PC skills