

## Member Services Representative

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Position:	Member Services Representative, Full Time
No. of Openings:	1
Compensation:	Level 1
Location	Oshawa
Reports to:	Branch Manager
Posting Expiry Date:	December 16 <sup>th</sup> , 2022

### Position Summary

To provide a full range of services to members including responding to members' enquiries, analysing needs and assisting members in utilizing the product or service that best meets those needs; cross sells credit union products; processes member transactions including deposits, withdrawals, bill payments, loan payments, money orders, travellers cheques, cheque cashing, etc. Processes member's requests for account updates and closures.

### Position Responsibilities

- To provide courteous service to members, striving to increase member satisfaction with the level of service provided;
- Promotes credit union products and services by identifying member needs and offering a full range of financial services, including investments as well as promoting sales and basic loan services;
- Provides assistance to members by opening memberships and accounts, answering questions, and servicing members' requests for deposits, withdrawals and transfers;
- Identifies and fulfils member's financial service's needs, cashes or certifies cheques, receives bill payments, orders cheques, buys/sells foreign currency, processes member statements, sells travellers cheques, personal money orders and travel insurance, processes RRSP, term deposit, Investment Shares, GIC, TFSAs, RRIF withdrawals, savings bond transactions, accepts applications for credit cards, member cards, foreign notes transactions, and all electronic channels;
- Balances and reconciles cash drawer;
- Filing and verification of all member account documentation. Audit of membership files as required;
- Provide relief to all other departments as required. Therefore, referencing the applicable job description for the duties assigned; and,
- Perform all other related duties as assigned.



## Position Qualifications

### Knowledge, Skills, Capabilities

- Ability to follow a regular re-occurring established schedule or routine. Requires the ability to organize and plan work in order to deal with deadlines, peak periods and unexpected situations;
- Requires working knowledge of basic products and services;
- Requires creativity and innovation to resolve issues by selecting amongst appropriate methods, procedures, products or services. Many problems are recurring in nature;
- Able to file, inspect, complete forms and enter data accurately. Requires the ability to gather, re-organize or group information or data in a meaningful order or format;
- Excellent member service skills in order to effectively ascertain the needs of the member and recommend the best solution. Ability to effectively cross sell products and services that meet member needs;
- Ability to communicate clearly, both verbally, in writing and by e-mail, in order to facilitate the effective exchange of information;
- Able to adapt to modifications to duties and shifts in priorities;
- Requires a working knowledge of accounting (balancing, reconciliation of negotiable instruments), office administration, Pathwise banking system and associated programs, filing and records management, Credit Union policies, by-laws and procedures; and,
- Proficiency in Microsoft Office including Word and Excel.

### Education & Experience

- Minimum education is a secondary school graduation diploma or equivalent, plus a minimum of 1 year related work experience.
- Subject to extended hours as per Article 5:01 (b) of the Collective Agreement.

## Applications

Candidates should submit their application, cover letter and resume to:

Attn: People & Culture  
Subject: Full Time Member Services Representative Application  
E-mail: [lrussell@pathwise.ca](mailto:lrussell@pathwise.ca)  
By: 5:00pm on December 16<sup>th</sup>, 2022