

Plus4 Credit Union Job Description

Position: **Receptionist**
Reports To: **Branch Manager**
FLSA: **Non Exempt**

Summary

Provides general office support with a variety of clerical activities and related tasks. The receptionist will be responsible for mail distribution, flow of correspondence, requisition of supplies as well as additional clerical duties. Deliver superior service to the members at all times. Present a positive, efficient and professional front line atmosphere. Leave the member with the feeling they are our number one priority. Treat all internal and external members with respect and courtesy.

Essential Duties

- Adhere to the Credit Union's "Value Proposition" service standards statement on a daily basis with internal and external members.
- Greets and directs members.
- Receive, sort and forward incoming mail.
- Coordinates the pick-up and delivery of express mail services.
- Promptly answer telephone inquiries and forward calls to appropriate personnel.
- Take accurate messages when necessary and follow up that call was returned.
- Possess and maintain knowledge of all credit union products, services, policies and procedures.
- Perform member account maintenance functions including ATM/Debit card orders, account data changes, and account inquiries.
- Comply with all state and federal regulations related to this job and to the credit union.
- Attend training classes as requested by supervisor.
- Monitor supply inventories and submit purchase requests to authorized personnel.
- Assists in the ordering, receiving, stocking and distribution of office supplies.
- Excellent verbal and written communication with department supervisors, co-workers, and members.
- Accurately and efficiently complete all member or account related forms and forward to appropriate department for action and/or filing.
- Must be available to travel to any branch location for back-up as requested by management, as well as work on Saturdays.
- May assist with other related clerical duties such as photocopying, faxing, filing, collating and loan audits.
- Performs other duties as assigned by the Branch Supervisor or Sales Director or Senior Management.

Role:

Employee shall demonstrate an understanding of and follow the requirements of all regulation compliance including but not limited to those Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Office of Foreign Assets Control (OFAC), Customer Identification Program (CIP) and Member Due Diligence (MDD) as it specifically relates to their job functions. Employee shall be trained annually in BSA/AML compliance.

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.

- Focus on serving the member, gaining the member's respect and trust, and always acting with the member in mind.
- Analytical ability to quickly assess member's financial needs and offer solutions.
- Proficient in use of a calculator and adding machine and proficient typing skills.
- Effective oral and written communication skills to converse in person or by phone with members.
- Ability to learn and use the credit union PC hardware and software.
- Must have a proactive and positive attitude toward members, supervisors, co-workers and the credit union.
- Must be proficient in Microsoft Office products, including but not limited to Word, Excel, email and Outlook.
- Interpersonal Skills - Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving or obtaining information which may require some discussion.
- Time Management - the ability to effectively prioritize tasks to use time efficiently and attend to a broad range of activities.

Education/Experience

- A high school education or GED.
- Up to six months of similar or related experience.

Physical/Mental Requirements

The physical demands described here 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.

- While performing the duties of the job, the employee is regularly required to stand, sit, walk, use hands to finger, handle, or feel, reach with hands and arms, stoop, kneel, crouch or crawl, and talk or hear.
- The vision requirements include: close vision and ability to adjust focus.
- Nature of position requires physical mobility and the ability to lift a minimum of 50 pounds.
- Must have flexibility to deal with changing work hours and locations as needed.

By signing below, employee agrees they are able to perform the essential duties listed within this document, as well as any additional duties assigned by their supervisor. The employee also agrees to actively seek out the information and training needed to perform these duties to the best of their ability.

This Job Description is not a complete statement of all duties and responsibilities comprising this position.

I have read and understand the duties, expectations, and qualifications detailed above for the Receptionist job role.

Signed:

Employee Signature

Date _____

Print Employee's Name