

**Financial Services Officer**

**Role:**

To promote a positive service relationship and improve account engagement with members and nonmembers by identifying loan products and account services that best fits their needs.

**Essential Functions & Responsibilities:**

* Takes member loan applications and underwrites according to loan policy and procedure. Follow up with member applications and inquiries. Process the approved loans and set up date to close the loan and make disbursements.
* Explains services to potential consumer and commercial account customers to generate additional business and to promote positive public relations.
* Resolves account-related questions and concerns with members and nonmembers.
* Removes, counts, and records cash from automated teller machine, ITMs and other branch technology.
* Evaluates all branch activities to ensure they are in compliance with established Credit Union policies, procedures, and objectives; recommends changes to manager.
* Performs other job-related duties as assigned.

**Knowledge and Skills:**

**Experience:** One year or more of similar or related experience.

**Education:** (1) A two-year college degree, or (2) completion of a specialized certification or licensing, or (3) completion of specialized training courses conducted by vendors, or (4) job-specific skills acquired through an apprenticeship program.

**Interpersonal Skills:** Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.