



Position Description

Title: Financial Services Representative
Reports to: VP, Retail Services

BASIC PURPOSE:

“We enrich lives.” Under broad managerial supervision, and in support of the Personal Account Managers, provides services excellence and fosters relationship building by promoting, up-selling and cross-selling loan and deposit products; provides administrative support for deposit products; adheres to security procedures. Expectations are that every employee will demonstrate our values of integrity, community, relationships, innovation, personal development and co-operative identity through their work and interactions with employees, members and the community.

MAJOR RESPONSIBILITIES:

1. Performs a variety of duties relating to the promotion and sales of deposit and loan products and services offered by the Credit Union including:
 - a) responding to member inquiries by providing information on the full range of products and services;
 - b) analyzing member needs and match the appropriate product or service;
 - c) exhibiting a high commitment to member client relationships by promoting the concept of relationship building; cross-selling all credit union products and services and refers member to Personal Account Managers, Wealth Management or Insurance subsidiary when appropriate;
 - d) promoting, up and cross-selling deposit products and services, including but not limited to, term deposits, RRSPs, RRIFs, deposit accounts, card products and electronic services;
 - e) opening and closing personal and business memberships;
 - f) complete and process MasterCard manual and CAP applications;
 - g) opening and closing of safety deposit boxes.
 - h) providing estate information and administration.
2. Provides deposit administrative support for the Personal Account Managers.
3. Adheres to security procedures as they pertain to the position.
4. May provide assistance to members with MSR duties during busy periods.

QUALIFICATIONS:

EDUCATION and EXPERIENCE;

- Secondary school diploma.
- Minimum three (3) years' experience in the financial, retail or hospitality industry
- Completion of CUIC Fundamentals of Personal Financial Planning

OR EQUIVALENT EDUCATION and/or WORK EXPERIENCE

POSITION COMPETENCIES;

- Working knowledge of our deposit products and services, including registered products.
- Working knowledge of banking system
- Working knowledge of personal computer based literacy skills, including keyboarding, Windows operating system, internet access and e-mail
- Working knowledge of productivity programs, especially Word and Excel
- Strong written and verbal communication skills
- Strong time management and organizational skills.

QUALIFICATIONS continued

Summerland Credit Union Leadership VALUES;

- **EXCEPTIONAL SERVICE / RELATIONSHIPS / INTEGRITY:** Provides an outstanding level of service to create lifelong members which result in enthusiastic referral sources who value the relationships and experiences they receive. We believe in collaborative, mutually beneficial relationships that are built with respect; whether with our employees, members or business partners, relationships are of the utmost importance. Our character is rooted in the principles of honesty, accountability and “doing the right thing” for our members. It’s what has guided us to now and will continue to drive us into the future.
- **INITIATIVE / INNOVATION:** Identifies what needs to be done and takes action to achieve standards of excellence beyond job expectation; is a self-starter; contributes new ideas; looks for ways to add value to our company; recognizes and acts upon opportunities; focuses on achieving results. We embrace the entrepreneurial spirit that allows us to make bold decisions. Never satisfied with the status quo, we are in pursuit of innovative ways to enhance services for our members and further our prominence in the industry.
- **CO-OPERATIVE IDENTITY:** We are a co-operative financial institution and as such subscribes to the co-operative identity, values and principles adopted around the globe.
- **COACHING / PEOPLE:** Provides timely guidance and feedback to help colleagues and peers strengthen knowledge and skills in order to provide exceptional service to members; provides instruction, positive models, and opportunities in order to help others develop skills; establishes good interpersonal relationships by helping people feel valued, appreciated and included. We believe in a diverse, inclusive environment where new ideas are welcomed and personal development, through continuing education, is encouraged.
- **COMMUNITY:** Acts as a leader within the community and participates in various community events; looks for ways to support the community and serve both our members and other Credit Union members visiting our community. Community is at the centre of everything we do. We are committed to supporting and investing in the people and ideas which will foster the growth of our community for years to come.
- **COMMUNICATION and INTERPERSONAL SKILLS:** Communicates effectively and respectfully at all times by actively listening and sharing relevant information; applies strong negotiating and team building skills that result in effective working relationships.