



# Personal Financial Representative I

Non-Exempt | Hourly (\$15.00-\$20.16)

## OVERVIEW

The Personal Financial Representative I performs limited transactional duties to serve members by receiving or paying out funds with a high degree of accuracy. A PFR I maintains accurate transactional records, providing basic cash receipt and payment services in accordance with credit union policies and procedures.

## DUTIES AND RESPONSIBILITIES

**25%** Build relationships and enhance member experience, and respond to member requests in a friendly, helpful, and positive manner.

**20%** Process transactions in a prompt, efficient, confidential, and accurate manner.

**20%** Maintain up-to-date comprehensive knowledge of all credit union products and services handled or promoted by tellers. Maintain up-to-date and comprehensive knowledge on all related policies and procedures, rules, and regulations for the teller area, including robbery procedures.

**10%** Promote, explain, and cross-sell other credit union services such as consumer and mortgage loans, IRAs, certificates, safe deposit boxes, debit and credit cards, online banking, traveler's checks, and money orders.

**10%** Balance cash drawer at the end of the shift and compare totaled amounts to a computer-generated proof sheet. Research and resolve discrepancies. Report any discrepancies to the supervisor as necessary. Count, check, and package coins and currency.

**5%** Ensure that the teller station is properly stocked with forms, supplies, brochures, etc.

**5%** Report malfunctions of teller computers and other equipment used at the teller station.

**5%** Check night depository bags and record proper information according to credit union procedures.

Must comply with all company policies and procedures, applicable laws and regulations, including but not limited to the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

## EDUCATION AND EXPERIENCE

### Education

High school or GED required.

### Experience

Six months to two years of similar or related experience is preferred.

Cash handling experience required.

### Skills

- Interpersonal skills, including verbal communication.
- Clerical skills, including navigating a computer system/typing (code input, knowledge of screens, and terminology).
- Ability to perform detailed work functions with minimal errors.
- Maintain a professional image and remain calm in stressful situations.

## ADA REQUIREMENTS

Individuals must bend, sit, and stand to perform primarily sedentary work with limited physical exertion and occasional lifting up to 50 lbs. Must be capable of climbing / descending stairs in an emergency. Must operate standard office equipment, including computer terminals and keyboards, telephones, copiers, facsimiles, and calculators. Must be able to routinely perform work on a computer for an average of 6-8 hours per day, when necessary. Must work extended hours or travel off-site whenever required or requested by management. Must be capable of regular, reliable, and timely attendance.

## ACKNOWLEDGEMENT

This job description is not a contract and should not be presumed to guarantee employment. Infuze Credit Union is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, gender, national origin, disability, age, or any other category protected by law.

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**EMPLOYEE SIGNATURE**

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**DATE**

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**AUTHORIZED REPRESENTATIVE**

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**DATE**