

**Member Services Generalist Opportunities!**

**Bi-Lingual Spanish/English**

Holy Rosary Credit Union (HRCU) has often been called "the melting pot credit union" over its 73-year history. Since it was organized in 1943, the credit union has experienced the arrival of many different ethnic groups into the field of membership.

We offer compassion to all who enter our credit union. Our members are not only members of a financial institution, they are members of the HRCU family. We seek not only to provide financial services, but to empower our members to be in control of their finances. We do this by overcoming language barriers, offering opportunities for education, and creating a mutual trust between our staff and our members

We have 2 part-time or full-time positions for persons who are truly generalists providing member services to our customers/members, process loans while also providing financial education. We are calling this position a Member Services Generalist. You know who you are. You are likely a seasoned credit union professional who has worked in a small branch location and has had to provide a multitude of services for your customers and most likely you have been the “answer person”. You enjoy wearing multiple hats and get satisfaction from all that you do in this kind of capacity.

These positions are located in our Hawthorne and CSL locations. You will need to let us know which location you want to be generally located at but there could be a need for working either on occasion. Please refer to our website for addresses.

Our days of operation are M-F and most Saturdays.

Our employees must present themselves both with a consistent professional & friendly attitude including a business-appropriate work attire.

**Key Responsibilities:**

Ensure accurate processing of loans by making sure that each one is properly documented, closed, disbursed, coordinated, and filed. Notify auto dealerships of any missing paperwork.

Open new share accounts and certificates. Assist members in the completion of Individual Retirement Account and Share Certificate applications.

* Process new account information including ordering checks, verifying eligibility, checking for appropriate signatures, filing cards, mailing welcome letters, etc. Type, laminate, and mail membership cards to members. Print starter or temporary checks for members. Assist members with Instant Issue ATM cards.
* Prepare coupons for skip-a-pay when sold.
* Assist members with wire transactions.
* Assist members in closing accounts.
* Assist members with discrepancies and complaints. Make corrections and refunds on

accounts if necessary.

* Ensure accurate processing
* Analyze and process consumer loan applications. Pull credit reports for all accounts, verify debts, estimate monthly payment for any outstanding debts not listed and add them to debts on application.
* Mail loan application and/or information to members and prospective members. Look up NADA values and provide quotes to members.
* Will recommend an appropriate course of action for the member or prospective member’s financial situation.
* Counsel and provide educational materials to members regarding budgeting, credit and money management.
* Provide all these members with an action plan detailing the recommended course of action to resolve their financial situation
* Follow-up with members after initial assessments to ensure they have a full understanding of options and recommendations presented to them regarding their financial situation.

**Experience, Skills, Abilities & Education**

**Attributes & Abilities**

* Can multi-task while maintaining a friendly & professional attitude.

Has high personal values and ethics. Does not compromise these at work.

* Knows business attire and overall look is different from that at home. Is anxious to comply with Holy Rosary Credit Union standards.
* Has high detail orientation resulting in consistent accuracy.
* Enjoys team work. (Your co-workers like working with you.)
* Likes to take initiative, where appropriate, such as keeping our workplace clean and organized.

**Skills & Experience**

* Must be bi-lingual Spanish/English. This is a non-negotiable requirement.
* 3-5 years credit union/banking experience is a plus - preferably in both member services & loan processing. We will train the right candidates however.
* 1+ years with financial education either in a formal or informal role, is a plus.
* 5 years using the Microsoft suite; generally comfortable using and learning software as needed.
* Is good at math. You may be asked to provide a transcript!
* 3-5 years’ experience with direct customer service is another plus.
* Valid Driver’s License (You may be asked to work other locations.)

**Education**

* A high school diploma or GED is required. Education beyond this or the equivalent is a plus

**Pre-employment Tests and Requirements:**

* Acceptable background check and drug test.
* Current Driver’s License with appropriate insurance; reliable car.
* Authorized to work in the U.S.

**Environmental Factors and Physical Requirements:**

This position requires the employee to work indoors in a typical office environment. While performing the duties of this job, the employee is required to have ordinary ambulatory skills sufficient to visit other locations, and the ability to stand, walk stoop, kneel, crouch and manipulate (lift, carry, move) light to medium weights of 1-25 pounds. Requires good hand-eye coordination, arm hand and finger dexterity, including ability to grasp, and visual acuity to use a keyboard, operate equipment and read application information. The employee frequently is required to sit, reach with arms, talk and hear.

**EOE**: Holy Rosary Credit Union (HRCU) is committed to creating an environment free of harassment or discrimination of any kind. We are committed to the principle of equal opportunity for all. Employment decisions at HRCU are based on business needs, job requirements and individual qualifications. We do not consider your gender, gender expression or identity, race, age, color, religion or belief, sexual orientation, disability, family or parental status, or any other status. We encourage members of underrepresented groups to apply. If you are smart, good at what you do, and willing to learn, we welcome you!