



Member Relationship Specialist III, Credit Union Job Description

JOB INFORMATION

<i>Job Code:</i>	115022
<i>Job Title:</i>	Member Relationship Specialist III, Credit Union
<i>FLSA Status:</i>	Non-Exempt
<i>Supervisory:</i>	May oversee student, temporary and/or resource workers.
<i>Job Family:</i>	Credit Union
<i>Job Family Group:</i>	Accounting, Finance and Banking
<i>Management Level:</i>	7 Individual Contributor

JOB SUMMARY

Resolves escalated member issues, completes high-level loan or account requests, and recommends appropriate products and services. Provides leadership and guidance within the department. Trains newly hired staff in department practices, policies, and operational guidelines. Supports achievement of department goals and deepens member relationships by providing outstanding member experiences. Performs Member Relationship Specialist I and II duties as needed.

JOB QUALIFICATIONS:

Education

<i>Req</i>	<i>Pref</i>	<i>Degree</i>	<i>Field of Study</i>
X		High school or equivalent	
	X	Bachelor's degree	in related field(s)

Additional Education

Check here if experience may substitute for some of the above education.

Combined experience/education as substitute for minimum education

Work Experience

<i>Req</i>	<i>Pref</i>	<i>Work Experience</i>	<i>Experience Level</i>
X		3 years	of customer service, sales, or retail banking experience or experience in a financial institution.
	X	5 years	of customer service, sales, or retail banking experience or experience at a financial institution.

Additional Work Experience

Check here if education may substitute for some of the above work experience.

Combined experience/education as substitute for minimum work experience

Knowledge, Skills and Abilities

<i>Req</i>	<i>Pref</i>	<i>Functional Skills</i>
X		Extensive lending experience and knowledge of consumer loan products and services. Demonstrated knowledge of various job-related regulations (e.g., Bank Secrecy Act, Regulation E, Gramm-Leach-Bliley Act).
X		Excellent interpersonal, written and oral communication skills.

Knowledge, Skills and Abilities

Req	Pref	Functional Skills
X		Demonstrated ability to work independently with minimal supervision and as a member of a team.
X		Ability to multi-task and build relationships in sales environment.
X		Demonstrated experience with office management software/tools (e.g. Google suite, Slack, Microsoft Excel).
	X	Demonstrated leadership and organizational skills.
	X	Knowledge of credit union service standards and loan operations, as well as all relevant local, state, and federal regulations governing financial institutions.

Licenses

Req	Pref	License(s)
X		NMLS Mortgage Loan Officer license.

Certifications

Req	Pref	Select Certifications	Enter Additional Certifications
X			CUNA Financial Counseling certification (FiCEP).

Other Job Factors

JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Ensures vault and required cash counts are completed in accordance with policy. Provides overrides when necessary. Provides second approvals for domestic and international wire requests. Performs Member Relationship Specialist I and II duties as needed.				
Provides leadership and guidance within the department. Trains newly hired staff in department practices, policies, and operational guidelines. Performs member experience observations of staff as needed.				
Assists members with submitting complex loan requests (e.g., business loans, student loans, home equity loans, lines of credit). Provides financial counseling. Approves applications within pre-determined parameters.				
Completes organization and business account applications; reviews consumer information from various reporting agencies, analyzes documentation, and approves or declines applications. Sets up accounts on core system. Approves IRA share account transactions.				
Accepts and processes levies and subpoenas according to policies and procedures.				
Assists members with submitting claims for insurance and debt protection products (e.g., GAP, MBI, Credit Life and Disability), as well as other ancillary products.				
Completes all required training to maintain compliance with all job-related applicable laws, regulatory requirements, and procedures. Promotes an environment that fosters inclusive relationships and creates unbiased opportunities for contributions through ideas, words, and actions that uphold principles of the USC Code of Ethics.				

Other Requirements

Essential:	Emergency Response/Recovery	Essential:	Mandated Reporter
Yes	In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue

Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: https://policy.usc.edu/mandated-reporters/
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: https://dps.usc.edu/alerts/clery/			No

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

Print Employee Name

Signature

Date

Print Manager Name

Signature

Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.