



Title: Deposit Raising Associate
Status: Exempt, Regular Full-Time
Reports to: Director of Marketing
Location: Oakland, CA or San Francisco, CA

Position Summary:

The Deposit Raising Associate provides day-to-day transactional and operations support to deposit-raising efforts of the Investment Associate, as well as support to Area/ Branch management and Call Center staff in their deposit-raising efforts. The objective is to provide MSD depositors/investors with the highest quality of service and satisfaction.

Principal Duties and Responsibilities:

- Demonstrate Self-Help's corporate competencies:
 - Mission and Values
 - Standards of Excellence
 - Teamwork and Collaboration
 - Initiative and Follow-Through
 - Customer Focus
 - Communication
- Work effectively and cooperatively with the Investment Associate, Branch Operations, and Call Center staff to ensure the highest level of member support is provided for investor deposit members.
- Ensure quick and accurate responses are made to investor deposit member inquiries from all sources, including:
 - Self-Help Website
 - Self-Help Federal Credit Union secured home banking portal
 - Self-Help Federal Credit Union mobile application chat/portal
 - Meridian Link Online Account Application
 - Email and phone calls
- Ensure all investor deposit activity is implemented in compliance with Self-Help Federal policies and procedures and in compliance with federal laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.
- Manage investor deposit activities, including but not limited to: new account openings (including preparing and sending Welcome Packets), renewal requests, payment changes & processing, updating member paperwork with new signers, audit/balance confirmations, statement or tax

duplicate copies, website/online inquiries and trouble-shooting, and annually calling members whose accounts have gone dormant and marked at risk of being escheated.

- Steward National MSD accounts in coordination with Investment Associate, including:
 - Proactively communicate with depositors about rate changes and regulatory/compliance changes
 - Engage with large MSD accounts (over \$50,000) on at least a quarterly basis with audited financials, Self-Help press or news, annual report/impact statement, holiday cards or handwritten notes, creation of reports, or other engagement touchstones.
 - Proactively engage with depositor prior to CD maturity with goal to maintain or increase deposits at every opportunity.
- Proactively recommend action plans to improve operational policies, procedures and controls, and mitigate controllable losses in operations.
- Serve as first escalation point for investor deposit member issues, and assist Investment Associate with a resolution of more complex or specialized issues including member complaints, exceptions or requests to speak with management.
- Assist with the identification/research of and outreach to current and potential investor deposit members.
- Work on special projects, as needed.

Education and/or Experience:

- High School Diploma or equivalent
- Bachelor's degree preferred
- At least 1 year relevant experience working in a financial institution or CDFI preferred

Knowledge, Skill and Ability:

- Knowledge of customer service principles and processes, including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Strong project management skills – ability to effectively plan, organize, and prioritize multiple tasks and/or projects to meet objectives and deadlines.
- Excellent communications, customer service, and interpersonal skills; flexible and team player.
- Maintain knowledge of product trends, industry and financial market trends, and competitive offerings.
- Analytical (financial and operational data), reporting skills and problem-solving skills.
- Proficient with Microsoft Office suite.
- Good writer/editor.
- Excellent problem solving skills.
- Desire to work in a diverse and team-oriented environment.
- Interest in social justice and consumer advocacy preferred.

Physical Requirements/Work Environment:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Close vision is required.
- Employee is regularly required to: sit; talk and hear; use hands to finger, handle or feel; and reach with hands and arms.
- Employee is frequently required to type and use a keyboard.
- The employee must occasionally lift and/or move up to 10 pounds.

About us:

Self-Help Federal Credit Union was chartered in 2008 to build a network of branches that serve working families and underserved communities. With 19 branches in California, 3 branches in Illinois, 2 branches in Florida, approximately \$680 million in assets, and serving more than 80,000 members and clients, Self-Help Federal is one of the fastest-growing low-income designated credit unions in the country. It is part of the national Self-Help family of non-profit organizations whose collective mission is to create and protect ownership and economic opportunity for all. For 36 years, the Center for Community Self-Help and its affiliates have provided \$7.2 billion in financing to help over 121,000 low-wealth borrowers buy homes, start and build businesses, and strengthen community resources. For more information, go to www.self-helpfcu.org and www.self-help.org.

We are an equal opportunity employer:

SHFCU is committed to providing equal employment opportunities to all persons regardless of race, color, class, age, religion (and lack thereof), disability that can reasonably be accommodated, marital status (including domestic partner status), ancestry, nationality, national origin, family status, sex (including pregnancy, childbirth, and related medical conditions), other medical condition (physical or mental), AIDS/HIV status, genetic information, sexual identity, gender identification (including transgender status), sexual orientation, and veteran status.

Compensation:

Competitive nonprofit salary, based on experience, plus a generous benefits package that includes health, dental, life insurance, flexible spending plan, retirement plan, and paid parental leave.

Please apply to our Human Resources Department:

Interested individuals please send a resume and cover letter to cahiringmanager@self-helpfcu.org and reference this job, **Deposit Raising Associate** in the subject line of your message.

The Self-Help Federal Credit Union is an Equal Opportunity Employer