



Position Title: Universal Banker, Floater

Status: Full-time position, Non-Exempt

Location: Little Village, Chicago

Description

The **Universal Banker, Floater** serve as a liaison between the member and the credit union. Provide account information by phone or in person, as well as information on the full range of credit union products and services. Open accounts for members, resolve issues, and professionally handle the member's daily needs.

Responsibilities include

MEMBER SERVICING

- Greet and welcome members and visitors to the credit union in a friendly and professional manner. Provide prompt, efficient and accurate.
- Promote credit union products and services based on member's needs.
- Open Dreamer Loans
- Open new membership accounts.
- Take applications and process consumer loans *
- Provide general and specific service-related information concerning credit union services or policies in-person or by-telephone.
- Respond to members' inquiries, requests, problems, and complaints and/or direct them to the appropriate person for specific information and assistance.
- Perform account transactions and maintenance as authorized, including processing share deposit payments, loan payments, CD transactions, lines of credit advances, and account transfers; disbursing cash and check withdrawals; monitoring receipts, counting cash and performing reconciliations; adding joint owners, completing address changes and competing any other necessary teller functions.
- Refer mortgage loans to Branch Manager.
- May be required to travel to cover other Branches.

CASH HANDLING AND BALANCING

- Open, close and balance cash drawer daily. Maintain drawer cash levels within prescribed amounts.
- Enter night, ATM and mail deposits.
- Handle Vault Teller responsibilities, managing, balancing and balancing flow of cash in and out of the vault.*
- Balance ATM daily. (Part of dual control team.)

BUSINESS DEVELOPMENT

- Participate in activities to build new relationships such as business development.*
Identify and refer potential leads for business development.*

OTHER

- Perform various administrative tasks.
- Mail receipts and checks to members as indicated by policy and procedure.
- Research accounts for deposit, withdrawal, and loan-payment discrepancies.
- Act as role model for teller staff
- Support teller staff with guidance on more difficult transactions
- Assist branch management with filing and record retention of daily reports
- Provide supervisor overrides for cash withdrawals up to \$5,000
- Support management in providing feedback on teller performance*
- Open and/or close in absence of supervisor, assistant branch manager and branch manager
- Responsible of supervising the branch in the absence of supervisor, assistant branch manager and branch manager
- Other duties, responsibilities, and projects as assigned.

All job duties, responsibilities and projects to be performed in accordance with credit union policies and procedures.

A Universal Banker must be able to competently perform all principal duties and responsibilities required of a Lead Teller.

This position description is intended to describe the duties most frequently performed by an individual in this position. It is not intended to be a complete list of assigned duties but to describe a position level. Furthermore, the essential functions are listed above and reasonable accommodations will be made to meet the requirements of the American with Disabilities Act.

EDUCATION AND/OR EXPERIENCE

- High school diploma or equivalent and three (3) to five (5) years of experience in banking or retail.

KNOWLEDGE, SKILL AND ABILITY

- Demonstrate Self-Help's corporate competencies:
 - Mission and Values
 - Standards of Excellence
 - Teamwork and Collaboration
 - Initiative and Follow-Through
 - Customer Focus
 - Communication

- Attention to detail.
- Ability to effectively organize and prioritize work.
- Excellent interpersonal skills.
- Ability to form and maintain strong relationships with internal and external customers.
- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Knowledge of economic and accounting principles and practices, banking and the analysis and reporting of financial data.
- Analytical and problem solving skills.
- Ability to use keyboard and data entry skills.
- May be required to travel to cover other branches.
- English/Spanish fluency is required.

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

We are an equal opportunity employer:

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

Compensation:

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

About Self-Help Federal:

Self-Help Federal Credit Union was chartered in 2008 to build a network of branches that serve working families and underserved communities. With 17 branches in California, 9 branches in Illinois, and 1 branch in Wisconsin, over \$1 billion in assets, and serving more than 74,000 members, 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 38 years, the Center for Community Self-Help and its

affiliates have provided \$8.5 billion in financing to help over 158,000 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.

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, "Universal Banker Floater, Little Village" in the subject line of your message.

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