

**Heritage Grove Federal Credit Union**  
**Job Description**

**Job Title:** Account Service Representative  
**Reports to:** Account Services Supervisor and VP Operations  
**Classification:** Full Time  
**Job Objectives:** Perform a variety of member service functions including processing member transactions.

**Job Functions:**

- To perform deposits, withdrawals, process loan payments and visa payments, and create cashier's checks and money orders for members.
- To process Visa cash advances according to established procedures.
- To receive and process member check orders.
- To assist members with basic account research, transaction inquiries, check copies, and information about credit union products and services.
- To perform general office duties like filing and typing as directed by management.
- To direct members with complex questions or specific requests to the appropriate department or person.
- To balance daily cash, check, and negotiable instruments received and disbursed according to established procedures.
- To accept coin for deposit and to balance and prepare bulk coin for deposit.
- To perform other duties as directed by management.
- Promote credit union products, services, and promotions to members.
- Meet monthly referral goals assigned by management.
- Maintain punctual, regular and predictable attendance.

**Education and Skills required:**

- High school diploma required.
- Must be able to communicate effectively and should possess good reading, writing, and math abilities.
- Must be able to operate standard office equipment and be competent in the operation of a computer terminal and software required to perform job duties.
- Must be able to work accurately.

**Experience Required:**

- 6 months work experience required, preferably in a credit union or other financial institution.
- Cash handling experience required.

**Working Conditions:**

Employment at Heritage Grove Federal Credit Union requires standing, walking, sitting, lifting, carrying, bending, kneeling, reaching above and below shoulder level, and continuous use of hands in repetitive tasks such as typing or data entry.

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Employees are also required to be able to speak in person and on the telephone, must have adequate hearing ability, and the ability to see clearly.

Employees are required to interact with others, meet established deadlines, and utilize problem solving ability and initiative.

Employees of Heritage Grove Federal Credit Union have access to non-public personal information regarding members, as well as proprietary trade secrets of the credit union. Employees must be able to maintain the confidentiality of such information and are required to use care to avoid inadvertently disclosing non-public information relating to the credit union and its members.

Employees may be exposed to potentially hazardous conditions while employed with Heritage Grove Federal Credit Union. These potential hazardous conditions may include the possibility of the credit union experiencing a robbery or other workplace violence.

Employees may be required to travel as directed by management pursuant to current policies of the credit union.

**Acknowledgement:**

I have read the above job description and acknowledge my understanding of the duties, working conditions and responsibilities set forth therein.

\_\_\_\_\_  
(Employee Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Credit Union Representative)

\_\_\_\_\_  
(Date)