



## POSITION DESCRIPTION

**DIVISION:** POPONDETTA BRANCH, RETAIL FINANCIAL SERVICES

**JOB TITLE:** MEMBER SERVICES CONSULTANT

**TITLE OF SUPERVISOR:** SENIOR MEMBER SERVICES CONSULTANT

### ABOUT THE ROLE

Reporting to the Senior Member Services Consultant, the Member Service Consultant is the first point of contact for all Membership and Loan related enquiries and is responsible for providing excellent customer service to nurture lifelong relationships with valuable Members of the Society.

### KEY RESPONSIBILITIES

- Thorough knowledge of all Society Products, Policies and Procedures
- Open new accounts and cross sell products and services to meet the Members' financial needs
- Process requests for changes and maintenance to members static records
- Appraise and make recommendations on Members' Withdrawal application forms
- Process account closures and cessation of membership upon request
- Conduct loan interviews and provide financial counselling and education
- Process and approve or deny loan applications within delegated approval limit
- Underwrite loan applications and submit for decision by higher delegated approval authorities
- Ensure that quality customer service is achieved and maintained
- Perform other duties as directed by the Senior Member Services Consultant and/or Branch Manager

## **KEY QUALIFICATIONS & REQUIREMENTS**

- Tertiary Qualification in Banking & Finance, Business Accountancy or Management or related field
- Minimum 1- 3 years hands on experience as a Customer Services Officer preferably in a banking/finance industry.
- Knowledge of Savings & Loan Societies' Lending Policies and Procedures
- Knowledgeable of Core Banking Systems/Applications (Ultracs)
- High level of communication skills – both written and spoken
- High level customer service skills – in person, telephone and email
- Attention to detail, be of sober habits and ability to review and make sound decision on queries