

Picatinny Federal Credit Union
Structured Compensation - Job Description
Member Experience Professional

Data Year: 2025

Prepared On: 09/24/2025

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| Department: | 100 | Grade: | 6 |
| Reports To: | | Classification: | Non-Exempt |
| Supervises Direct: | | Supervises Indirect: | |
| Approved By: | | Effective Date: | 10/02/2023 |
| | | Revised Date: | 01/27/2025 |

Role:

Responsible for generating business and deepening relationships by selling products and services to potential and existing members that help them achieve their goals and realize their dreams. Responsibilities include achieving sales goals, receiving and processing member financial transactions and providing high quality member service that makes members feel cared for and appreciated.

Essential Functions & Responsibilities:

- E 40% Recognizing and referring cross-sell opportunities. Selling financial products and opening deposit accounts. Processing consumer loan requests from application to disbursement.
- E 30% Responding to member inquiries and concerns and creating positive solutions.
- E 20% Receives and processes member financial transactions including deposits, withdrawals and loan payments; transfers amounts from member accounts as directed. Answers incoming phone calls and assists members or directs them to the appropriate area for assistance.
- E 5% Performing daily/weekly sales reporting.
- N 5% Performs other job related duties as assigned.
- E 0% Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Oice of Foreign Assets Control.

Performance Measurements:

1. Provide informed, prompt, and accurate service to all members and associates by greeting and waiting on members in lobby within X minutes, answering the telephone within X rings, and responding to messages or correspondence within X hours.
2. Open all accounts, certificates of deposit, and other Credit Union products or services in accordance with federal regulations, ensuring all related forms and documents are completed and filed/scanned in a timely manner.
3. Carry out assigned duties and responsibilities with minimal errors according to established branch standards.
4. Actively cross-sell products and services to members to achieve or exceed X% of all established individual and branch sales goals.
5. Troubleshoot and resolve member and internal inquiries in a timely and accurate manner, communicating the resolution to affected parties.
6. Ensure compliance with all applicable Credit Union policies, procedures, and regulations.
7. Maintain a professional work environment and businesslike appearance.

Knowledge and Skills:

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| Experience | One year to three years of similar or related experience. |
| Education | A high school education or GED. |
| Interpersonal Skills | Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication. |
| Other Skills | Working knowledge of established teller procedures and policies. Understanding of Credit Union operations. Communicates information and ideas in speaking so others will understand. General office equipment such as calculators, computers, photocopiers, and scanners. |
| Physical Requirements | Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing/descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance. Must be flexible to work at any credit union location. |
| Work Environment | Must be able to routinely perform work indoors in climate-controlled shared work environment with moderate noise. |

Salary Range: \$19.94/hr - \$24.92/hr. *Hiring rates may be dependent on a number of factors, including years of directly related work experience, education or special skills*

This Job Description is not a complete statement of all duties and responsibilities comprising the position.