

Position Announcement: Credit Union  
Position Title: Financial Service Representative  
Location: 498 7th Avenue 2nd FL NY, NY  
Department: Finance Department  
Classification: Full Time  
No. of positions: 1  
Salary Range: 40K-45K

## PRIMARY FUNCTION

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The Financial Service Representative will be able to assist members in achieving financial wellness with one-on-one coaching. Provide sessions on budgeting, saving, understanding credit, managing debt, and planning for the future. Works in close liaison between member services representatives to serve new and existing members with resources to serve their financial needs.

## RESPONSIBILITIES

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- Conduct thorough financial assessments to understand members' financial goals and needs.
- Develop and implement personalized financial plans.
- Orchestrate financial sessions that include budgeting, saving, understanding credit, managing debt, and planning for the future.
- Build and maintain strong membership relationships through effective communication and regular reviews of financial plans.
- Stay current on market trends, financial regulations, continuous education, and professional development.
- You will build and maintain professional relationships with other financial professionals and attend events.
- You will use financial software and tools for analysis, portfolio management, and financial planning.
- Provide excellent membership service and address members' inquiries promptly and professionally.
- Functions also included processing and funding loyalty, birthday, and emergency loans and any other SDL that might be implemented in the future.
- Read, review, and order members' credit reports.
- Promote and cross-sell financial products that meet those needs and recommend our third-party services as needed.
- Must become FICEP Certified upon gaining employment with the credit union.

## QUALIFICATIONS:

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- Must be able to create financial plans based on member's specific needs.
- Must be a great listener, nonjudgemental, have strong organizational skills, and attention to detail.
- Demonstrate Excellent problem-solving abilities and abilities to multi-task and prioritize tasks.

- Bilingual Preferred
- Excellent communication and interpersonal skills.
- Must be able to identify soft/ hard skills and empathy skills dealing with members' financial behaviors.
- Proficient in using Microsoft applications (i.e., Word, Excel, PowerPoint, and Outlook).

All interested persons meeting minimum qualifications are encouraged to submit a resume and cover letter to [jobpost@1199federalcu.org](mailto:jobpost@1199federalcu.org).

1199 SEIU Federal Credit Union is an equal-opportunity employer.

Posting Date: 03/11/2024

Applications must be received by: 03/25/2024