



PARAMA's dedication to supporting Lithuanian's and all Ontarians by providing peace of mind and trusted advice in all of life's moments is an essential part of the Member Services Representative role. A growth mindset coupled with an adaptive and resourceful demeanor is table stakes for a collaborative, forward thinking and highly engaged employee.

Part of a highly engaged team of financial service professionals who are committed to providing PARAMA members with an extraordinary member experience. This role requires laser focus and commitment to a proactive approach while being forward thinking every member, every time.

Every member deserves and expects a personalized holistic approach to their banking needs. The Member Services Representative (MSR) role requires a growth mindset and an agile demeanor. Initiative and integrity are intertwined expectations of the role. You are a self-starter, are driven and organized and thrive interacting with members!

The MSR role reports into the Assistant Branch Manager. Each MSR receives regular individualized one on one coaching and observational coaching, reflecting PARAMA's commitment to talent development and an incomparable employee and member experience.

This role is an ideal starting point for a fulfilling career within the Credit Union industry. The MSR embodies the culture of PARAMA and is the first point of contact to refer the member to the in-house subject matter experts in Wealth, Investments and Lending.

### **Responsibilities:**

- Serve members with excellence in a manner which is accurate, timely and efficient
- The MSR acts as an ambassador of PARAMA and greets each member by name
- MSRs partner with other members of the branch team to collaborate and deliver the best solutions to help members achieve their financial goals
- After an opportunity is identified, follow up is critical to ensure completion of the referral process
- Fulfil member requests while looking for avenues to be forward thinking by identifying opportunities through communication and inquiry
- Exhibit business savvy by referring an opportunity to a Financial Services Advisor

- Promote the value of online and mobile banking by demonstrating and signing up each member be it over the phone, in person or via email
- Develop goals with manager that are clearly defined, measurable and achievable, and align them to the business unit and strategic priorities for PARAMA
- Continued individual learning and development to align with PARAMA's core competencies and values
- Advocates for the branch, advances innovative thinking amongst team, and promotes an entrepreneurial growth mindset
- Day to day responsibilities include maintaining cash balances, list and balance outgoing cheques, and balance all daily transactions
- The MSR will ensure they are aware of, and adhere to, operating procedures and policies to safeguard the assets of PARAMA

### **Key Accountabilities and Duties:**

- Provide outstanding service to members face to face, over the phone or online
- Answer inquiries and always strive to increase member loyalty
- Make proactive outbound awareness and service follow up calls to members
- Handle member requests for deposits, withdrawals, transfers, and other basic transactions
- Promote PARAMA's services by explaining benefits and features of PARAMA solutions
- Identify and fulfill member's financial service needs, including
  - cashing and certifying cheques
  - processing bill payments
  - ordering cheques
  - buying/selling foreign currencies
  - processing member statements
  - identifying the need for travel insurance
  - processing RRSP and term deposit transactions
  - assisting Members in getting a debit card
  - online and mobile banking set up
- Promotes PARAMA products and services when a need or opportunity specific to the member is proactively identified
- Have proactive dialogue with members to identify unrealized needs. Proficient at "opportunity spotting"
- Make referrals to in house specialists and advisors as required
- Solve member issues and know when to escalate
- Participates in the counting of large cash deposits
- Identifies and reports suspicious patterns of activity that are suspected to be related to money laundering
- Assists with general office duties, processing and administration as required
- Strict adherence to all legal and regulatory requirements

### **Requirements:**

- Excellent relationship and verbal communications skills
- Interest in banking products and services

- Preference will be given to applicants with:
  - Fluency in English required. Knowledge of Lithuanian is an asset.
  - Previous experience handling cash
  - Previous experience in a sales role

There is an expectation to promote PARAMA Credit Union in the local community by participating in and being involved in community activities or events while demonstrating the company values.

**Interested?**

Submit your resume along with a cover letter describing your interest in this role, and the skills and attributes that you will bring to our team to [careers@parama.ca](mailto:careers@parama.ca)

Dated: July 12, 2022