



PT Teller/Loan Officer

Ocean Shores, WA (<http://maps.google.com/maps?q=900+Point+Brown+Ave+NE+Ocean+Shores+WA+98569>)



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Description

Invest in People. Empower Success

Teller/Loan Officer

TwinStar Credit Union is seeking a **PT-Teller/Loan Officer** to join our team at our **Ocean Shores** branch! This position is responsible for building valued financial relationships with our members by actively recommending and cross-selling credit union products and services that best meet our members' financial needs. This position will also perform routine member transactions including deposits, withdrawals, loan payments, transfers, and check cashing. At least 1 year of experience with customer service, cash handling, and sales in a financial services or retail environment is required.

Position closes April 6th, 2023.

Status

Part-Time, Non-Exempt

Location

Ocean Shores TwinStar

900 Point Brown Ave NE WA, 98569

Visa sponsorship not available.

Contact us at 800.258.3115 with any questions or request for accommodation.

Requirements

Essential Functions and Tasks

- Greets members upon entrance to credit union in a courteous, timely, and professional manner; determines the member's needs and assists members or directs the member to the appropriate person.
- Escorts member back to station or where member is comfortable to offer assistance.
- Opens new share accounts (savings, checking, money market, certificate, business, organizational, and benefit accounts, individual retirement, trust accounts, estate, custodial, and guardianship accounts) or closes existing accounts by gathering and entering necessary information into computer system; and processes necessary paperwork.
- Posts transactions on computer system including deposits, withdrawals, loan payments, transfers, check cashing, credit and cash advances; and handles money orders, and cashier's check purchases.
- Creates and maintains a professional and effective business relationship with the member; provides members an opportunity to establish financial goals through recommending credit union programs to meet their specific needs (Financial Planning, BALANCE program, Business Services and 1st Mortgage, Home Advantage etc.).
- Teaches members how to best utilize newest technology by assisting them in set up and troubleshooting (tablets, smartphones, laptops, computers, etc.).

- Evaluates and verifies loan applications and credit criteria. Determines value of collateral. Approves loans within limits of authority and notifies applicants of loan decisions. Requests additional information, if required. Coordinates and processes closings. Ensures that each loan is promptly and properly prepared, documented, processed, approved and disbursed.
- Actively cross-sells and opens credit union products by utilizing account information to ask pertinent questions to assess member's financial needs.
- Contacts (on-boards) members in person, by letter, and phone to market products and services. Follows-up on contacts and increases penetration of member financial services while using CRM program.
- Protects the assets of the credit union by properly identifying members and performing transactions with accuracy.
- Maintains and balances cash within established limits.
- Performs a variety of account maintenance duties (i.e., name and address changes, etc.).
- Prepares and executes 90 day action plans. Establishes goals and achieves goals through effective sales programs designed to meet member needs.
- Exhibits effective written and oral communication skills. Displays professionalism in presentations to members and potential members. Displays a positive and professional attitude.
- Performs MIP (Member Identification Program) process as outlined in the credit union's Bank Secrecy Act procedure. Ensures the security and confidentiality of private member information. Completes Bank Secrecy Act related forms, including, but not limited to, the following: Currency Transaction Report, Suspicious Activity Report and Negotiable Instrument Log.
- Performs required OFAC (Office of Foreign Assets Control) check as outlined in the credit union's Bank Secrecy Act procedure and reports any positive matches to the Branch Manager or Designee.
- Monitors and communicates potential suspicious activity/transactions to the BSA Officer.
- Effectively participates in Sales and Marketing initiatives through educating our members of program features and benefits while contributing to overall branch production using the Schneider Sales Model.
- Uses established sales programs to meet or exceed production and referral goals established by Management.
- Represents TwinStar Credit Union at events as required.
- Attends required technical and sales training as required.
- Maintains well-developed working knowledge of the assigned duties and job functions; keeping up to date and requesting additional training and/or development as needed.
- Reports regularly to work and returns from breaks and meal periods on time according to the posted schedule.

Education & Experience Required

Education

- High school graduate or GED

Experience

- 1+ years of experience with customer service, cash handling, and sales in a financial services or retail environment.

Education and Experience Preferred:

Education

- Associates Degree (A.A./A.S.) or higher

Experience

- 2+ years customer service, cash handling in a financial services or retail environment experience.
- Experience opening new accounts
- Experience in consumer lending

Pay Range

The full pay range is **\$17.62-\$26.42/hr.** Depending on experience and qualifications.

Benefits

This position is eligible for Part-Time Regular benefits. Employees and their eligible family members have access to a wide array of employee benefits, such as medical, dental, vision and life insurance coverage. Medical, Dental, and Vision insurance is paid at a 100% by company for the employee coverage. We also offer Health Care FSA (HCFSA) and Day Care FSA (DCFSA). Employees have access to disability and AD&D insurance. Employees are able to enroll in our 401k plan. Part-Time Regular employees accrue 4 hours of vacation and 4 hours of sick leave, on a monthly basis. Part-Time Regular employees also receive 11 paid holidays throughout the calendar year, 1 personal holiday, and 8 hours of volunteer time. Credit union employees classified as part-time regular status, and who work a standard work schedule, receive four hours of pay for each observed holiday as long as they meet the requirements. All benefits except 401k start the first of the month after 30 days of employment. Employees become eligible to contribute to 401k on the first of the month following 60 days of employment.

We invest in people and empower success.

At TwinStar Credit Union, we offer our employees rewarding careers serving our members and communities. Our approach is centered on the member experience while creating "Digital First" solutions. We know our employees do best when they are cared for. The experience created for members and employees is our difference.

Our Experience Principles are:

1. Make it easy for us
2. Deliver us value
3. Empower us
4. Care about us
5. Know us

Through these principles, we recognize that investing in the growth and development of others is a measure of success. At TwinStar, we are deeply committed to creating an environment where members and employees feel empowered to bring their whole and authentic selves to each experience. We embrace and celebrate our diversity in individuals and in thought while striving for inclusion in all we do.

Career Development

Being an employee of TwinStar Credit Union is so much more than a job. It's a place of belonging, where each employee is surrounded by others who support in a way that helps ensure the ongoing success of all.

We recognize that investing in the growth and development of our employees is one of our most important measures of success.

The experience of our members ultimately ties back to the experience of being a successful and well-developed TwinStar employee. It begins with a full Onboarding program – a multi-day learning experience geared toward helping new employees feel welcome, connected, included, and engaged. But that's just the beginning!

Other opportunities for growth include:

- A vast library of curated online learning content, developed by in-house professionals or through reputable industry partners.
- Coaching and mentoring using proven methods and techniques.
- Engaging and interactive instructor-led training, facilitated by seasoned experts.
- Networking with industry professionals in the Pacific Northwest and across the country.
- Tuition assistance to open doors to professional licensure, certification, or degrees of study.
- In-house Employee Resource Groups, creating inclusive micro-communities to use your voice.

EEO Statement

TSCU is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, veteran status, disability, sexual orientation, gender identity, or any other protected status.

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