

LENDER/MEMBER SERVICE REPRESENTATIVE BEAUMONT CREDIT UNION LTD.

THE POSITION

- ◆ Act as primary resource for active solicitation of membership growth opportunities by following up on incoming credit checks, staff referrals, sales initiatives, and member inquiries.
- ◆ Respond to member inquiries, referrals, and identify needs by providing financial counseling, promoting, and explaining the full range of Credit Union products and services.
- ◆ Assist members in analyzing their personal financial affairs and provide information, advice and financial planning recommendations to fulfil their needs while promoting Credit Union products.
- ◆ Promote, upsell, and complete the sale for the full range of deposit, investment, and registered products by identifying and pursuing opportunities within the existing portfolio or through referrals. Open, change, and close new accounts for business, personal, youth, and organization and cross sell the full range of products.
- ◆ Conduct loan and mortgage interviews. Grant or decline loan or mortgages within established approval limits and seek approval for loans above these assigned limits.
- ◆ Execute the branch marketing program to attain loan, deposit, sundry product, and member growth objectives set out in the business plan.
- ◆ Review delinquent accounts as assigned by Manager/Supervisor and initiate appropriate collection action.
- ◆ Complete and submit reports as required to the Deposit Guarantee Corporation, CMHC, and other internal reports as requested by Manager/Supervisor.
- ◆ Provide functional direction and assistance to the Administration Department and other employees regarding the registration and release of securities, mortgage renewals, paid out loans, credit check requests, and property tax payments.

THE PERSON

- ◆ Above average interpersonal, leadership, problem solving, and decision-making skills.
- ◆ Working knowledge of the Eroworks Banking and CRI Loans Origination systems. Windows XP and other computer applications a definite asset.
- ◆ Minimum two years experience. Demonstrated ability in sales and selling a definite asset.
- ◆ Responsible, mature individual with good knowledge of Credit Union products and services.
- ◆ Must be willing to work in a fast-paced changing environment.
- ◆ Bilingual – French and English a definite asset.

COMPENSATION

- ◆ Salary range \$46,488 to \$58,032 annually
- ◆ Incentive Pay Program
- ◆ Comprehensive Benefit Package

THE CREDIT UNION

- ◆ Located in Beaumont, Beaumont Credit Union is a full-service open bond Credit Union serving all Beaumont and surrounding area residents.
- ◆ Assets \$197 million, loans \$164 million, membership 6,384, staff 33

We thank all applicants for their interest. Only those under consideration for the position will be contacted

CLOSING DATE: February 19, 2010

SUBMIT RESUME TO:

Dawn Weisner, Consumer Lending Manager

DWEISNER@ALBERTA-CU.COM