

TITLE : Advisor
SUPERVISOR : Branch Manager

I. BASIC PURPOSE

Under general supervision and consistent with Khalsa Credit Union's mission, vision, guiding principles, the Advisor is responsible for providing exceptional customer service to current and potential members by completing member transactions, providing members with solutions to their financial needs, and/or referring members to an appropriate Sr. Advisor.

II. MAJOR RESPONSIBILITIES

Provides exceptional customer service by providing advice and support to members; processes cash related transactions including, but not limited to: opening member accounts, deposits, withdrawals, utility payments, etc. May assist members in completing forms, term deposits and applications for credit/debit cards.

Supports the achievement of annual branch goals and objectives through proactive promotion of FW products and services, participating in branch campaigns, and actively seeking referral opportunities during interactions with members or potential members. Identifies member life stage and seeks opportunities to cross-sell or refer to an appropriate branch advisor. Achieves established individual sales and referral targets.

Performs administrative duties which may include, but not limited to: balancing the treasury, daily ATM maintenance and troubleshooting, preparing and distributing cash orders.

Depending on the region and/or branch, the Advisor may be required to provide administrative support to branch advisors, make outgoing calls to members, complete compliance and/or audit activities, complete end to end processes related to ATM and night deposits, etc.

Other duties as required by branch leadership.