



# Role Profile

## Financial Service Administrator

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**Reports to:** Asst VP, Corporate Services  
**Salary Pay Band:** 9 (Min. \$38,670/ annum to Max. \$51,560 per annum)  
**Last Revised:** August 2022

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### Position Overview

The Summerland Credit Union (SCU) Financial Service Administrator (FSA) plays an essential role in providing support and assistance to Staff & members through service excellence, and in maintaining the SCU digital repository. The FSA builds trust and loyalty with each member interaction, and gains a deeper understanding of the member needs to deliver financial solutions that will enhance their financial well-being either personally or referring them to fellow experts. The FSA has a positive and adaptable approach with strong attention to detail, excellent technology skills, excels in a flexible & fluid work environment, and has effective relationship building skills both within the organization and externally with member interactions. A key function of the role is to ensure an exceptional level of service for staff and members to enhance the brand of SCU throughout the region as a respected leader of financial solutions.

### Key Responsibilities

#### **Service Leadership**

*Creating value; growing relationships; learning and development*

- Working with SCU staff, adopt, implement, and maintain the best practices from established practices, procedures, and policies.
- Act as internal auditor for all retail staff's day work, checking accuracy against banking system and reports; reviews and corrects banking system anomalies identified on BI reports; tracks day work to identify serious errors, misuse, or training needs; reports exceptions to appropriate Manager
- Respond to members' enquiries, either written or verbally, by positively providing information on the features of each product and service; resolve routine member problems and concerns with all credit union products & services or refer members to another team member for any other services.
- Process all documents received from Retail Services, or other departments, as required
- Administer all applicable registered products, including all reporting
- Process all daily correspondence into the digital repository, or any remaining documents, ensuring documents imaged adhere to imaging protocols and procedures, including the maintenance and assurance all imaged documents comply with current retention schedule(s)
- Perform administrative tasks as required, including daily branch mail, requests for information and other member related monitoring or reporting
- Provide staff and member support on AFT system

- Provide support for the retail & commercial Lending departments, as well as other departments or positions as required
- Serve, inform, and educate Members with respect to their financial goals and opportunities through the provision of ongoing financial services, KYC annual reviews and other applicable compliance-mandated processes, and/or other Member contact processes
- Monitor and deliver exceptional performance with agreed upon goals; with Asst VP, adopt and ensure ongoing personal development.

### **Member & Community Experience**

*Building member loyalty; staying informed; building community connections*

- Build member loyalty and trust by exercising sound judgement and thoughtful consideration in delivering exceptional member experience
- Gain a deep understanding and demonstrate commitment to living our Vision, Mission, and Values
- Effectively and efficiently complete various member servicing activities and administrative duties
- Understand and demonstrate commitment to our enterprise-wide Vision, Mission, and Values
- Enhance own profile and professional image in the community by participating in community events, associations and/or partnerships

### **Employee Experience**

*Engagement; teamwork; leadership; learning; commitment; accountability*

- Maintain and expand technical knowledge of financial products, systems, and services.
- Promote teamwork and cooperation as a peer leader; act as a mentor and role model to share knowledge and skills to assist and support talent development
- Support staff and encourage collaboration to accomplish common goals
- Expanding knowledge of digital imaging / repository processes to process documents and answer staff queries
- Assist Assistant VP with any special projects
- Recognize and celebrate team successes; encourage teamwork and collaboration.

### **Risk Management**

*Member confidence; risk/loss mitigation*

- Ensure all documentation is prepared and/or executed in accordance with established policies, procedures, and relevant legislation by keeping apprised of changing rules and regulations as well as keeping a current knowledge of all SCU lending, and deposit products and services.
- Demonstrate a high level of risk management knowledge and ensure adherence to all legislative and regulatory requirements
- Maintain up to date and complete Member files with documentation in hardcopy and/or electronic form as required.
- Display confidence and exercise sound judgement in decision making
- Expanding knowledge of fraud management processes & anti-money laundering (AML) policies
- Electronic files are maintained utilizing approved software
- Adhere to all policies and procedures to mitigate risk of loss to Summerland Credit Union
- Display confidence and exercise sound judgement in decision making
- Take necessary action on issues or concerns arising from reviews and audits

## Skills & Attributes

- Passion for delivering exceptional member/member service and dedicated to building strong relationships and connections in the community
- Committed to personal growth and development. Responsible for ensuring skills and knowledge are up to date to meet industry and position requirements
- Instills confidence and trust of others through thoughtful, clear, and open communication
- Demonstrates a good knowledge of all SCU products and services
- An expanding knowledge of computer skills, including MS Windows and Office program environments, banking system, and digital imaging software
- Demonstrates strong interpersonal skills and the ability to communicate effectively both verbally and in writing
- Ability to excel in a flexible & fluid work environment, adapting quickly to changing priorities with a willingness to tackle new challenges
- Knowledge of the complete clearing cycle process is an asset
- Demonstrates strong attention to detail and accuracy in completing work and providing information
- Takes a proactive and respectful approach in addressing problems, issues, or conflict with a positive view to reaching new and better solutions
- Organizes work and assignment of tasks to maximize efficiency, clearly communicates expectations, roles, and responsibilities

## Experience & Education

- minimum of three years' experience in job related experience
- Secondary school diploma
- Completion of CUIC Fundamentals of Personal Financial Planning course
- Completion of CUIC Products & Services course
- Maintain proficiency with developing systems, applications, and productivity programs
- Combined experience and post-secondary education in the areas that are directly related to industry will be considered

## Application Information

Please apply in writing to the Assistant VP, Corporate Services (Ashley) by 5:00 pm, Wednesday, August 31, 2022.