

Gold Coast Federal Credit Union

Job Description

Job Title: Member Experience Representative
Department: Member Services
Reports To: Branch Manager

FLSA Status: Non-Exempt
Prepared Date: April 2026

Summary

Responsible for providing high-quality member service and performing a variety of financial transactions to meet member needs. Assists members with their financial transactions, processes deposits and withdrawals, opens new accounts, cross-sells products and services, and provides exceptional service to all members and prospective members for the purpose of branch growth with complete member satisfaction. This position combines traditional teller responsibilities with member service functions, supporting branch objectives through strong relationship-building, accuracy, and compliance with Credit Union policies and regulations.

Essential Duties and Responsibilities include the following. Other duties may be assigned.

Member Experience and Relationship Management

- Greet members professionally, identify their financial needs and provide solutions.
- Provide outstanding member service and resolve routine and complex account inquiries.
- Build and maintain strong member relationships through proactive engagement and cross-selling.
- Educate members on Credit Union products, services, and digital tools while determining members' needs and recommending appropriate solutions.
- Educate members on fraud prevention and detection.

Teller & Transactional Duties

- Accurately process deposits, withdrawals, transfers, and loan payments.
- Balance cash drawer daily and comply with dual control and cash-handling procedures.
- Identify and prevent potential fraud and report suspicious activity.
- Adhere to all BSA/AML, OFAC, and regulatory requirements.
- Adhere to GCFCU and FCUSS (Shared Branch Acquirer) policies and procedures as well as state and federal law and regulations, such as BSA, Reg. CC, OFAC, TISA, Information Security etc.
- Be aware of BSA matters commensurate with position, report any suspicious activity to the manager or compliance officer and satisfactorily complete any required BSA training.

Sales and Account Services

- Open accounts and service all membership questions and applications.
- Cross-sell and refer appropriate Credit Union products and services such as auto loans, personal loans and lines of credit, deposit accounts and products and digital services to members.

- Assist members with account maintenance, debit cards, online banking, address changes and more.
- Support branch sales goals while maintaining a “we do more” attitude with all members.
- Work towards certification in Credit Union Financial Counseling.
- Complete assigned training courses.
- Work towards becoming State of Florida Notary.

Branch Operational Support

- Assist with branch opening and closing procedures assigned.
- Maintain accurate documentation and ensure policy compliance.
- Support branch operations during peak hours or staffing shortages.
- Participate in training, coaching, and team meetings.
- Working Saturday hours are required.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience

Associates degree (A.A.) or equivalent from two-year college and a minimum 2 years related experience in a financial institution; or equivalent combination of education, experience and training.

Language Skills

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedures manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization.

Mathematical Skills

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

Technical Skills

Ability to utilize computer terminal and/or personal computer and mouse. Be able to operate standard office equipment such as a telephone, fax, calculator, keyboard and photocopier and laser document printer. Type a minimum of 20 words per minute.

Reasoning Ability

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

Certificates, Licenses, Registrations

Work towards certification in Financial Counseling. Obtain license/certification on payment protection insurance products. State of Florida Notary.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit; use hands to finger; handle; or feel; reach with hands and arms; talk and hear. The employee frequently is required to walk, stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

Work Environment

The work environment characteristics here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

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