



New Account Representative

Well, well, well. Look who it is...

We've been waiting for you to swing by and check us out. We have some jobs here at Andigo that could be a great fit for you, since you have a hankering for a fast-paced, get-it-done workplace and a passion for helping people, just like the rest of our team.

But before we get into all that, a little about us. While you may not have heard our name – say it with us, “Andigo sounds like indigo” – we’ve expanded to 40,000 members and lots of sponsor organizations (businesses with a bank-at-work perk for their employees). Good folks from the greater Chicago area and across country.

Did you catch that? That one word you won't see big banks use? “Members,” that's right. Andigo is a not-for-profit, member-owned credit union. We exist for one and only one reason: to help our members achieve their goals whenever, wherever they go. Because we're not a bank, we don't drive up profits just because shareholders demand it. Instead, we focus on driving up member happiness through low loan rates, high deposit rates and low or no fee products and services. Makes banks seem like kind of a bummer, huh? That's why we need to get the word out about all of the great opposite-of-bummer things we're doing for our members here at Andigo.

That's why we need you.

You're someone who sees a wrong and rights it. You take work seriously but not yourself. You want to surround yourself with other highly motivated, highly fun people who want to grow Andigo. You want to prove that when we set a goal to make a difference in our members' lives. Together we truly can. That's not easy, but you already know that because you're a person who loves a challenge as much as you love top compensation and A+ benefits for your hard work.

We think you belong here, do you? Thought so. Let's go!

Summary

The ideal candidate is a team player who is caring, courteous, and passionate about providing an exceptional member experience. They have a genuine interest in helping people and finding solutions to their needs. The New Account Representative serves as the primary point of contact for the opening of new and existing member accounts through our online delivery channel.

Essential Duties and Responsibilities

- Offer best in class service to our members.
- Open accounts for both new and existing members. Adhere to all required compliance guidelines and Andigo processes and procedures to ensure all audit and quality control reviews are passed with 100% accuracy.
- Conduct thorough member investigation/interviews, analyze fraud patterns/trends in the application process and consult with Loss Prevention and Compliance to proactively prevent opening accounts with a high risk of loss.
- Provide new members with moderately complex information and answer questions regarding accounts, policies, services and products.
- Maintain expert knowledge in fiduciary account set up, such as power-of-attorney, estates, trusts, representative payees and custodial accounts.
- Maintain knowledge of credit union services, related policies and key features of the credit union's website and electronic service delivery platforms.
- Advocate member adoption of campaigns, promotions and digital products
- Display a courteous and professional attitude with all people, including employees, members and vendors.
- Act as a system administrator for online account opening admin console, managing and maintaining console settings and configurations.
- Work closely with system vendor to implement and test new features, enhancements and releases as they become available and are requested.
- Respond to requests for admin reports related to online account opening console.
- Participate in the day-to-day processing of work to ensure all departmental service level agreements are achieved.
- Work cooperatively with other departments to ensure timely resolution of problems, issues or requests.
- Identify continuous operational improvement opportunities and service efficiency initiatives, recommend solutions and champion the implementation of agreed upon changes.
- Assist in the development and updating of department policies and procedures.
- Responsible for learning and adhering to new or current procedures, policies, guidelines and programs.

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 essential functions.

Education and/or Experience

- High school diploma required with at least two years recent experience in a customer service role.
- Deep functional knowledge of financial products and services.
- Position requires excellent customer service skills, including good communication, analytical, and interpersonal abilities.
- Commitment to the concepts of “team effort” and “quality member service.”
- Ability to work with minimal supervision and effectively prioritize workload.

Language Skills

Requires a high-school diploma and a minimum of two years of experience in financial or retail customer service environment.

Mathematical Skills

Must possess a thorough knowledge of basic math skills.

Reasoning Ability

Ability to carry out instructions furnished in written and oral form; must be able to work with minimal supervision. Able to effectively communicate with people in all formats. Ability to maintain a high level of confidentiality. Close attention to detail with a high degree of accuracy.

Computer Skills

Requires strong proficiency for Windows based software and ability to learn core processing systems. Must have excellent keyboarding skills.

Physical Demands

The employee must occasionally lift and/or move up to 25 pounds.

Work Environment

The noise level in the work environment is moderate and can occasionally become loud.

Compensation and Benefits

Andigo is proud to offer a comprehensive benefits package that includes medical, dental, vision and life insurance options. A generous 401(k) and vacation plans.

EEO Disclaimer:

Andigo is an Equal Opportunity Employer. We do not discriminate on the basis of race, religion, color, sex, age, national origin or disability.



To apply

Please send your resume to Georgia Katsianis at georgia@careerdevsavant.com