

InRoads Credit Union is seeking a diligent and knowledgeable full-time LIVE Advisor I to join our digital channel LIVE team in St. Helens, Oregon. This position comes with a full benefit package including, a matching 401k.

The LIVE Advisor I enhances the member experience through the utilization of InRoads lending systems, video chat technology, phone, online applications, email or other software delivering high quality, consistent service to members and prospective members using our InRoads LIVE delivery channels. The job duties will primarily consist of member engagement through building positive relationships, with a main focus on new accounts and lending. Routinely answers member questions and educates them about the organization's products and/or services and helps members make informed choices when doing business with the organization. Ensures that requests are processed in a timely manner and the individual(s) is updated throughout the process. Understands and consistently achieves goals and targets while ensuring that the individual's unique needs are identified, and appropriate solutions are developed to assist them in achieving their financial goals.

This role will require an Associate's degree in a business-related field (preferred) and a minimum of 2-years of experience in a financial institution in the loan, mortgage, or deposit account areas. Alternatively, 3-years previous experience working in a member facing role in a credit union or other financial industry, may be considered.

A successful LIVE Advisor I should be equipped with the following:

- Knowledge of consumer account and loan products and services and products offered by the Credit Union
- Knowledge of department software, such as, but not limited to Eltropy, XP2, MeridianLink and Encompass
- Understanding of Credit Union philosophy, our organization, bylaws, and operational procedures
- The ability to comply with the requirements of the Bank Secrecy Act, AML, and OFAC as it specifically relates to the job functions and other regulations that pertain to job responsibilities
- Experience with spreadsheets, word processing, Outlook, and database software applications is required
- Ability to maintain composure while under pressure and interact with members using video technology, by telephone, and through other communication methods using active listening skills and excellent teamwork
- Must be reliable in creating highly accurate work results, meeting strict deadlines, and prompt and friendly service delivery
- Requires working with others in a group or team and the ability to remain flexible despite interruptions and/or routine changes to priorities and/or job duties
- Must be comfortable communicating with video technology
- Must have the ability to work a Monday through Saturday, with Saturday being a primary workday and be bondable

InRoads Credit Union is an Oregon-based not-for-profit financial institution. At InRoads, we are that trusted resource for our members and communities. We're here to deliver the financial expertise our members want and need, from affordable loans and financial resources, to money saving advice and planning. When our members succeed, so does the credit union. Our employees are a vital part of that success. Transparency, celebration of individuality, confidence, the ability to work with members to achieve their financial goals and dreams, and strong communication skills are necessary for any successful candidate.

Together we are InRoads Credit Union.



Job Posting LIVE Advisor I

If you feel a connection to our credit union after reading a little about the position and our organization, and you meet minimum qualifications, submit your employment information (letter of interest, resume and application) as soon as possible. This position will remain posted until filled.

InRoads is an equal employment opportunity employer.