



Solar Loan Specialist - Position Description

POSITION SUMMARY

Using communication and relationship management skills with TOPCU's members and future members, the Solar Loan Specialist proactively works to effectively answer Solar loan inquires and process applications. Situations can move quickly from low stress to high stress and can require some flexible hours.

ESSENTIAL FUNCTIONS

- Open accounts and process transactions including withdrawals and direct transfer requests
- Originate, process and close all types of loans with a primary focus on TOPCU's Solar Loans
- Assist members via appropriate channels with requests, problems and complaints
- Follow-up on commitments and member interactions via appropriate channels
- Make follow-up calls
- Assist team members with questions and concerns and provide necessary/requested information
- Actively promote and cross sells appropriate products and services to meet individual, departmental and company goals
- Make effective referrals to other specialists
- Actively participate in TOPCU business development and other promotional events
- Assist business development with processes to develop and implement growth opportunities
- Following established procedures and policies
- Provide timely, accurate and complete reports as requested by supervisor and ensure steps are taken to correct unsatisfactory results
- Set up ACH payments, funds transfers and direct deposits
- Perform other duties as assigned
- Mandatory compliance of all regulations including BSA/AML, adhere to TOPCU procedures and accurately complete applicable forms:
 - Maintain awareness of and report suspicious activity
 - Complete annual BSA training
 - Notify immediate supervisor of any substantive discrepancies

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Our mission and values, and communicate it to all members internal and external
- TOPCU's products, services, policies and procedures and how our products compare with competition's
- All applicable state and federal regulations
- Microsoft (Word, Excel, Power Point), Windows and all programs/software applicable to department

Skills:

- Organization and time management
- Attention to detail
- Analytical and mathematical
- Communicate clearly and professionally with internal and external members
- Active listening
- Effective problem solving

Ability to:

- Manage and complete multiple tasks accurately and by deadline
- Make product/service recommendations that meet member's financial needs

- Follow TOPCU policies and procedures
- Understand relevant federal and state regulations and apply to job functions effectively
- Work in a fast-paced, highly motivated atmosphere
- Learn and utilize computer based operational systems applicable to department
- Lift up to 25 pounds
- Understand ethical concerns and make decisions that maintain TOPCU's integrity in line with the code of conduct

MINIMUM EDUCATION, EXPERIENCE AND TRAINING

- High School Diploma or GED
- Two years of experience in a sales culture
- Two years of relevant experience in a financial institution

PRE-EMPLOYMENT

Pre-employment Credit Check: Yes
 Pre-employment Bond ability Check: Yes
 Pre-employment Drug Testing Required: Yes
 Pre-employment Background Required: Yes

Reports to: Solar Loan Manager	FLSA: Hourly – Non-exempt
Location: Any Branch	Status: Full-Time
Reviewed: 11/19 (M Scarzello)	Created: 11/19
Supervisor: No	

Physical Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Repetitive Motion	Repeating movements of arms, hands, wrists, fingers				X
Talk	Express or exchange ideas verbally				X
Hear	Perceive sound by ear				X
See	Obtain impressions through the eye				X
Kneel	Bend legs at knee, come to rest on knees			X	
Crouch/Squat	Bend body down and forward, bending legs and spine			X	
Crawl	Move on hands, knees, and feet	X			
Climb	Ascend/descend ladders, stairs, ramps	X			
Sit	Sit			X	
Stand	Stand			X	
Walk	Move about on foot; average distance per shift 3-5 miles		X		
Bend/Stoop	Bend downward and forward by bending spine at waist			X	
Lift	Raise or lower object > 10 lbs. from one level to another			X	
Lift	Raise or lower object > 25 lbs. from one level to another			X	
Carry	Transport an object				X
Push	Press with steady force, thrust objects forward, downward, outward		X		
Pull	Drag or tug objects		X		
Turn/Twist	Move a body part in circular motion			X	
Balance	Exceeding ordinary body equilibrium	X			
Reach	Extend hands and arms in any direction			X	
Handle	Seize, hold, turn with hands				X
Distinguish Color	Ability to distinguish color				X
Fingering	Picking, pinching, typing, or otherwise with fingers rather than whole hand				X
Grasping	Applying pressure to an object with the fingers and palm			X	
Feeling	Perceiving attributes of objects, such as size, shape, temperature, or texture			X	
	Definition	Never	Occasionally	Frequently	Constantly

Mental / Cognitive Activity					
Communication	Comprehend and use basic language, either written or spoken, to communicate information and ideas				X
	Comprehend and use technical or professional language, either written or spoken, to communicate complex ideas				X
Calculation	Perform numerical operations using basic counting, adding, subtracting, multiplying, or dividing				X
	Perform complex quantitative calculations or reasoning using algebra, geometry, statistics, or abstract symbols			X	
Problem Solving	Formulate and apply appropriate course of action for routine or familiar situations			X	
	Use logic to define problem, collect information, establish facts, draw valid conclusions, interpret information and deal with abstract variables for unique or unfamiliar situations			X	
Environmental Conditions	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Weather And Temperature	Protection from weather conditions but not necessarily from temperature changes				X
	Subject to outside environmental conditions – no effective protection from weather	X			
	Activities occur inside and outside		X		
	Subject to extreme cold (typically below 32°)	X			
	Subject to extreme heat (typically above 100°)	X			
Atmospheric Conditions	One or more of the following conditions that affect the respiratory system of the skin: fumes, odors, dusts, mists, gases, or poor ventilation		X		
	Worker is required to wear a respirator	X			
Noise	Sufficient noise to cause the worker to shout in order to be heard above the ambient noise level	X			
Vibration	Exposure to oscillating movements of the extremities or whole body	X			
Hazards	Proximity to moving mechanical parts, moving vehicles, electrical current	X			
	Working on scaffolding and high places	X			
	Exposure to chemicals	X			
	Exposure to oils: air and/or skin exposure to oils and other cutting fluids	X			
	Worker is required to function in narrow aisles or passage ways	X			
	Worker is exposed to infectious diseases		X		
	Worker is required to function around prisoners or mental patients	X			

Physical Requirements Checklist

- SEDENTARY**
- Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body.
 - Sitting most of the time.
- LIGHT**
- Exerting up to 20 pounds of force occasionally and/or a negligible amount of force constantly to move objects.
 - Use of arm and/or leg controls requiring greater exertion of force than for sedentary work, and worker sits most of the time.
- MEDIUM**
- Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- HEAVY**
- Exerting up to 100 pounds of force occasionally and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- VERY HEAVY**
- Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force constantly to move objects.

This position description is intended to indicate the basic nature of the position(s) allocated to this class and examples of typical duties that may be assigned. Any one position may not include all of the duties listed, nor do any listed examples include all tasks, which may be found in positions of this class. This position description does not constitute an employment agreement between the employer and employee and is subject to revision by the employer as the needs of the employer change and/or requirements of the job-related duties expand or are updated.