MMBB
A Financial Services Ministry™

Position Title: Member Service Specialist
Department: Service Center, MBDS
Reports to: Director. Service Center

Mission

MMBB Financial Services will be a premier Christian financial services ministry for the free church community, providing comprehensive financial solutions for its members and their families during their journey to and through retirement.

Position Summary

The goal for this position is to handle correspondence and emails through the Service Center and provide support for *Senior Benefits Specialists*. This position is accountable for providing quality written information and solutions to member/employer inquiries through letters and email responses. Strong proofreading and writing skills needed utilizing MS Word in a high-volume client services environment. This is accomplished by building the member/employers' understanding of MMBB benefit coverage, resolving concerns and problems - using the appropriate resources of MMBB - and promoting additional services that meet the needs of members/employers and help grow MMBB's overall annual premiums and assets. Promotes loyalty and related asset retention with information provided and quality service.

Primary Responsibilities

CORRESPONDENCE

- Handle and process correspondence requests through the Service Center (e.g. Billing, retirement, death letters initiated from Service and other MMBB staff).
- Respond to and follow up on basic member and employer requests and send call requests to other processing units as appropriate.
- Mail/email/fax requested forms to Members and/or Employers.
- Utilize technology / software driven tool (letter system) to support state of the art Correspondence initiatives.

SERVICE PHONE SUPPORT

- Serve as back-up phone support to *Senior Benefits Specialists* when needed
- Ability to effectively communicate with MMBB members, as well as all levels of MMBB employees.
- Answer routine questions on member / employer account balances, address changes, forms and additional routine questions.
- Coordinate Service metrics – Support and produce reports for analysis.

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- Other duties and projects as assigned.

Qualifications/Position Requirements

- College degree preferred;
- At least 3 years in financial services, financial planning, retirement planning or customer service experience.
- Knowledge of all types of employer-sponsored retirement plans, IRAs, and personal investments.
- Thorough knowledge and comfort with financial concepts and investments, clergy compensation and taxes, and retirement savings vehicles.
- Strong people skills with an ability to think like the member/client and a passion to deliver top quality service and sound judgement when diagnosing client inquiries.
- Courtesy and professionalism a must.
- Excellent oral and written communication skills.
- Comfortable interacting with people in-person and over the phone.
- Active listening and consultative skills.
- Strong problem solving with a well-developed sense of urgency and follow-through.
- Ability to work in a team environment, as well as work well independently.
- Ability to prioritize with strong organizational skills while also being extremely detail oriented.
- Proven record of dependability and punctuality.
- Proficiency with CRM systems, like Microsoft Dynamics along with Microsoft Word, Notes, Excel.
- Experience in or with religious and/or nonprofit organizations a plus.
- Bi-lingual (Spanish) a plus.
- Series 6, 7 license a plus.