

ABC Financial Institution

JOB DESCRIPTION

Associate:

Position: Financial Service Representative

Reports to: Assistant Branch Manager

Updated:

Position Summary: The Financial Service Representative is responsible for the delivery of initiatives as they relate to building primary relationships with customers/members, providing outstanding service, and achieving branch goals. Promote and build positive relationships with customers/members and provide solutions to their financial needs.

Primary Job Responsibilities:

- Ensure that customers/members are promptly and professionally served. Must be a champion of service and sales.
- Build customer/member loyalty by processing transactions, accurately and efficiently.
- Promote and build positive relationships with customers/members and provide solutions to their financial needs.
- Possess working knowledge of financial institution products to grow business by matching value added products and services to customers and potential customers.
- Support best practices to continually improve sales, service and operational duties.
- Adhere to established procedures related to branch security and safety: opening/closing procedures, robbery procedures, etc.
- Conduct business development activities to attract new business.
- Assist with regular promotional campaigns to attract new customers/members.
- Assist with establishing and maintaining a strong working partnership with retail management and team.
- Have the ability to perform a broad range of duties
- Support the Mission, Values, and Promise of the Financial Institution.
- All other duties as assigned.

Secondary Job Responsibilities (may include):

- Participate in community events.
- Utilize FSI's Members Only Website, The Smart Cart for ideas and tips.
- Utilize FSI's Bi-Monthly Newsletter, *The In-Store Advantage*; *Monthly Advantage Podcast*; *Quarterly SuperMarketing Calendar*.
- Assist with social media presence.

Qualifications:

- A strong and proven work ethic.
- Effective interpersonal skills.
- Ability to work in a fast paced environment under time constraints.
- A competitive and proactive nature.
- Adaptability and flexibility with work schedules.
- Willing and capable of learning new technology.
- Demonstrated sales and service success
- Demonstrated cash management success
- Problem solving skills with the ability to derive solutions.
- Exhibits creativity, innovation and extreme attention to detail.
- Two year college degree or equivalent work experience.
- Ability to meet deadlines in a timely manner.