

Financial Services Representative

Basic Qualifications

Education/Training: A high school diploma or equivalent.

Skill(s): Proficient reading, writing, grammar, and mathematics skills; proficient interpersonal, verbal and written communication skills using tact and diplomacy in all in-person and telephone customer interactions; proficient operation of network computers/software and other equipment necessary to handle financial transactions; ability to multi-task and think on their feet; maintains confidentiality; exhibits professional dress and demeanor; visual and auditory skills; ability to stand, bend, stoop, reach, and lift items weighing up to 50 lbs.

Experience: None required.

General Responsibilities

Responsible for performing a variety of duties to support the paying and receiving function of the assigned branch office; learns and utilizes required service and sales skills; learns to open deposit accounts; coordinating work within the department/office, as well as with other departments; reporting pertinent information to the immediate supervisor; responding to inquiries or requests for information. This is a service and sales position.

Essential Duties

1. Performs a variety of duties to support the paying and receiving function, as well as the sales function, of the assigned branch office of which the following are illustrative:
 - a. Embraces our vision to deliver the highest quality products, service, and convenience in financial services.
 - b. Actively learns, demonstrates, and fosters the Fleetwood Bank corporate culture in all actions and words.
 - c. Nurtures and retains customer relationships by extending a courteous welcome and delivers accurate and timely customer service according to the established guidelines, including cashing checks, accepting deposits and withdrawals, handling loan payments and dispensing monetary instruments. Looks for opportunities to convert service activities into sales opportunities.
 - 1) Balances cash drawer accurately and efficiently on a daily basis.

- 2) Accurately scans daily transactions according to established procedures.
 - d. Supports the day-to-day operations activities of the branch, as assigned, including: cash vault balancing, maintaining and balancing coin machine, reporting, tracking, and servicing the ATM. Maintains branch supplies and an awareness of inventory.
 - e. Maintains up-to-date knowledge of products, services, and technology.
 - f. Demonstrates proper usage of Fleetwood Bank Service & Sales skills in all customer interactions after successfully completing Fleetwood Bank's CORE service and sales training.
 - g. Learns to open deposit accounts and services.
 - h. Contributes directly to the success of the branch by recognizing and uncovering opportunities.
 - i. Communicates information relating to currency transactions and BSA reports.
 - j. Allows customer access to safe deposit boxes according to established policies and procedures.
2. Coordinates specific work tasks with other personnel within the department/office as well as with other departments in order to ensure the smooth and efficient flow of information.
 3. Abides by the current laws and organizational policies and procedures designed and implemented to promote an environment which is free of harassment and other forms of illegal discriminatory behavior in the work place.
 4. Cooperates with, participates in, and supports the adherence to all internal policies, procedures, and practices in support of risk management and overall safety and soundness and the Bank's compliance with all regulatory requirements, e.g. Community Reinvestment Act (CRA), Bank Secrecy Act (BSA), Equal Credit Opportunity Act, etc.
 5. Reports pertinent information to the immediate supervisor as requested, or according to an established schedule; compiles information as necessary or as directed and provides data to appropriate Bank personnel.
 6. Responds to inquiries relating to his/her particular area, or to requests from customers, other Bank personnel, etc., within given time frames and within

established policy.

7. Actively seeks ongoing learning opportunities that will contribute to professional growth and enhance the level of service provided to the customer.
8. Actively participates in community activities in a manner which reflects favorably on the Bank.

Ancillary Duties

1. Contributes to the team by willingly participating in all assigned duties and responsibilities, as well as additional tasks which may be requested.

Job Location

Assigned branch office

Equipment/Machines

1. Telephone
2. Calculator
3. PC/Keyboard
4. Printer
5. Copy machine
6. Fax machine
7. ATM
8. Scanning equipment
9. Smart phone/tablet
10. Coin Machine