

**Customer Service Representative II** - Performs customer services, such as opening various deposit accounts and assists customers with questions regarding bank services. Cross-sells products and services to new and existing customers and provides quality customer service to further customer relations. Fills in for tellers as needed

**Job Requirements:**

- High school diploma or equivalent.
- Two + years of job related experience
- Successful completion of in-house training program or other approved training program.
- Experience in teller functions.
- Good understanding of financial institution products and services.
- Sales experience, particularly in cross-sales.
- Good interpersonal communication and computer skills.
- Knowledge in the institution's research tools

**Specific Job Functions:**

- Provides a complete range of customer services at the financial institution, including: opening new accounts, explaining available financial institution products and services, and gathering customer information to process new and existing accounts.
- Provides assistance to the loan officer and staff when needed.
- Receives deposits and ensures that all accounts are properly processed.
- Prepares paperwork and assists customers in the signing of documents to process all accounts. Establishes retirement accounts, makes arrangements for direct deposits.
- Answers customer inquiries and assists customers with other account issues.
- Completes arrangements and documents for special services such as exchanges of foreign currency, etc.
- Assist in answering the telephone and transferring calls to the appropriate personnel.

- **Assists in other areas of the financial institution during peak business hours, when needed.**
- **Safe deposit box services.**
- **Process Savings Bond orders.**
- **Provides efficient and courteous customer service, cross-marketing products and services to generate new business for the financial institution when appropriate.**
- **Prepares and maintains account paperwork, including signature cards, check orders, ATM/Debit card requests, transfers and service charges.**
- **Fills in as teller when needed**
- **Relates complete account information to customers in a timely manner.**
- **Greets and admits authorized customers to safe deposit vault area. Screens customers gaining access to the safe deposit boxes, and maintains safe deposit activity records.**
- **Performs other duties, as assigned.**