

New Accounts Representative

SUMMARY:

Works under supervision; opens new accounts, verifies and processes alterations to existing accounts, sells other organization services, answers customers questions, and resolves related account problems. The position requires a thorough knowledge of all types of account ownership, account classifications, as well as a broad knowledge of organization services.

Job Functions include: (Note: this is a representative list only - complete list provided with purchase)

- Interviews customers to obtain information and explain available financial services, such as savings and checking accounts, Individual Retirement Account, Certificates of Deposit, savings bonds, and securities.
- Processes a variety of transactions for customers including the opening and closing of accounts, answering questions, and researching for the best choices for the customer.
- Operates computer CRT terminal to accurately open accounts, access account information, and generally update customer account information.

(also details Supervisory Responsibilities, Qualifications, Education and/or Experience, Language Skills, and work environment)