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# Example of Financial Service Representative Job Description

Our company is hiring for a financial service representative. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for financial service representative

* Protect client information by following security guidelines and procedures
* Profile existing and potential customers to determine banking needs and recommend appropriate products and services
* Achieve cross-sell ratio, deposit and loan goals
* Maintain knowledge of bank products, services and sales campaigns
* Provide friendly and accurate customer service promoting customer satisfaction through cross-selling and follow-up functions
* Review, process and /or prepare documentation for new accounts, consumer loans and Cashline requests
* Make sales calls to potential customers
* Ensure adherence to legal and bank requirements
* Will back up Customer service Representatives and maintain a cash drawer
* Will assist with other projects and duties when needed

## Qualifications for financial service representative

* Acts as lead in branch activities in the absence of or in conjunction with, the Branch Management Team
* Objections
* Billing and account resolution experience preferred
* Automated systems experience preferred
* Two or more years of RECENT experience in a customer service position
* Excellent time management skills needed in order to maximize the number of clients that can be assisted while maintaining a high level of customer service