



# Example of Operations Representative Job Description

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Our innovative and growing company is hiring for an operations representative. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for operations representative

- Provide product and operational expertise to T&S, branches and other departments
- Act as liaison between various areas of T&S, branches and other departments as required to fully satisfy customer issues in a timely manner
- Assist Operations Manager with complaint investigations, resolution and responses
- Perform corrections and adjustments for client accounts within authorized transaction limits or with management approval
- Adhering to policies and procedures set out by the firm and CCRA
- Obtaining and following up on all documentation required to process transactions
- Communicating with clients, lawyers and executors both verbally and in writing regarding estate issues
- Ensuring timely and accurate follow up to enable efficient and effective processing and completion of transactions
- Investigating and researching problems
- Advising appropriate departments to make adjustments/corrections

## Qualifications for operations representative

- Ensuring compliance with tax policies and procedures pertaining to tax forms
- Providing duplicate tax slips as required
- Administrative maintenance of all fees and rebates including administration

- Provide reports and statistical information to management as required, including information to assist in continuous improvement, initiatives and to identify training gaps/non adherence to policies
- Cross-train new and existing staff, and participate in job shadowing and training sessions
- Ensure all items pertaining to error accounts and control accounts are reconciled and records are accurately maintained and filed