



Locations: Dallas, North Carolina and Charlotte, North Carolina

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## Customer Service Representative, PT

### Summary/Objective

The Customer Service Representative is someone whose role is to provide information regarding the Bank's products and services to its customers. He/she also has the responsibility of handling any inquiries and resolving customer complaints. The Customer Service Representative will be cross trained and will also function fully as a Customer Specialist.

The job description of the banks' Customer Service Representative includes protecting the Bank's image and contributing to the achievement of the Bank's overall goals and objectives.

**Essential Functions** Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Assist customers with routine account-related requests such as: assist in opening or closing any customer products and services of the bank; funds transfers; automatic funds transfers (AFTs); stop payments; inquiries about bank deposit products and service charges; inquiries about ATM and debit card usage and limits; inquiries about checking and savings accounts transactions; inquiries about funds availability; and check verification requests by third parties.
2. Research and resolve customer problems, acting as the customer liaison between other Bank departments when necessary.
3. Research customer questions regarding electronic funds transfers and initiate "Reg E" disputes when appropriate, including the completion of all necessary documents and affidavits.
4. Cross-sell bank products and services based on customer needs in accordance with the Banks' program standards.
5. Refer customer requests for service charge rebates to the Branch Manager.
6. Process necessary paperwork to rebate customer service charges.
7. Perform customer requested research, including printing statement and check copies.
8. Input, maintain and/ or delete ATM and debit cards within system.
9. Transfer funds to cover customer overdrafts as directed by bank operations.
10. Notify the Operations Department of required adjustments as reported by customers.
11. Contact customers to notify them that check orders and/or debit cards are ready to pick up at the bank.
12. Distribute to customers and properly log all "hold statements" and check orders held by the bank.
13. Escort appropriate bank personnel into the vault and maintain dual control for safekeeping access and official check and ATM card requisition.
14. Assist the operations processing specialist by verifying the accuracy of document images.
15. Open, set timers and close the safe deposit vault utilizing dual control.
16. Conduct call-backs to external check printing companies to verify customer information.

17. Maintain the Bank's files for currency transaction reports, customer safekeeping receipts, loan and trust collateral receipts, commercial resolutions, powers of attorney, court orders, levies, miscellaneous deposit documentation and general correspondence.
18. Follow all bank and regulatory compliance related policies and procedures, including Bank Secrecy Act/Anti-Money Laundering and reporting suspicious activity to the BSA Officer.
19. Please note this job description may not cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

## **Competencies**

1. Customer/Client Focus.
2. Personal Effectiveness/Credibility.
3. Problem Solving/Analysis.
4. Teamwork Orientation.
5. Initiative.
6. Stress Management/Composure.
7. Organizational Skills.
8. Technical Capacity.

## **Supervisory Responsibility**

This position has no supervisory responsibilities.

## **Work Environment**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

## **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle, or feel; and reach with hands and arms.

## **Position Type/Expected Hours of Work**

This is a part-time position with a maximum of 20 hours per week. Schedules may be set between 8:00am through 5:00pm Monday through Thursday, and until 6:00pm on Friday.

## **QUALIFICATIONS**

- ◆ High school diploma minimum; Banking experience preferred.
- ◆ Ability to enter data on computer with speed and accuracy, and good mathematical aptitude.
- ◆ Pleasant manner in dealing with customers.
- ◆ Ability to recognize referral opportunities for other Bank services and products.
- ◆ Ability to work under pressure.
- ◆ Successful completion of in-house training program.
- ◆ Willing to comply with all Bank policy, procedures, and regulations.