



## CSR II / CD / IRA Specialist JACKSON

### Job Summary

Serves as the initial contact between the customer and the Bank. Provides a full range of banking services with emphasis on selling time deposit products. Provides customer service to customers in the maintenance of their relationships with the Bank.

### Job Functions

- Assist customers with account information
- Demonstrate knowledge of United Bank's products and services and match them appropriately to customer needs
- Sell bank services.
- Take incoming calls for customer service.
- Specializes in opening and processing all types of CD's and IRA's.
- Maintains product knowledge by learning new selling techniques, new products, and market trends.
- Quotes interest rates on time deposits when required.
- Provides customers with information on deposit accounts, rates, service charges, account restrictions and other relevant account information.
- Asks pertinent questions of customers to determine their banking needs.
- Prepares and reviews new account paperwork with customers.
- Responds to customer inquiries regarding their personal and business accounts.
- Adjusts customer accounts for overdraft charges with proper approval.
- Greets and acknowledges customers, answers telephone inquiries.
- Other duties may be assigned.
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### Job Requirements

- Quick learner, energetic, articulate, and detail oriented.
- Demonstrate a "team" attitude toward the bank and coworkers.
- Excellent attention to detail and ability to meet deadlines under pressure.
- Ability to deal tactfully with customers and co-workers.
- Attention to detail and confidentiality a must.
- Understand regulatory issues concerning CDs/IRAs.
- Ability to navigate the Bank's computer information system and telephone system.
- Detailed knowledge of United Bank products and services.
- High School Diploma or equivalent.
- Three years' experience with CD's and/or IRA's.
- Excellent interpersonal skills and characteristics necessary to effectively communicate with customers.

- Ability to handle sensitive information of the bank and customers in confidence.
- Ability to multitask a variety of projects on a daily basis.
- Working knowledge of bank resources, the areas of expertise and the Bank's policies and procedures.
- Effective communication skills and the ability to listen intently.
- Confident and self-motivated.

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