

Web-Site Job Posting

Request Date: 05/18/2021 Branch or Dept.: Sandy Branch

Post Position

Pull Position

Change Position

Position:	Financial Services Administrative Assistant I
Date Available:	05/18/2021
Location:	38975 Proctor Blvd. Sandy OR 97055
Status:	Full Time
Schedule:	M-F 8am-5pm
Bank Contact:	Terri E.
Phone Number:	503-668-2521
Fax Number:	503-668-7825
Physical Address:	38975 Proctor Blvd Sandy, OR 97055
Email Address:	telsberry@clackamascountybank.com

*****Resumes are only accepted with a completed CCB Application*****

**CCB Applications are available at our Main Office located at
38975 Proctor Blvd.
Sandy, OR 97055**

Or

Request an application by email-

telsberry@clackamascountybank.com

CCB is an EO Employer/Vets//Disabled

See below for job description

Job Description
Financial Services Administrative Assistant I / II

SUMMARY

To assist the financial services manager in an administrative support position.

MANDATORY REQUIREMENT (Cambridge Requirement)

Background check/credit check and finger printing required

ESSENTIAL DUTIES AND RESPONSIBILITIES

Customer Contact Skills

- Greet customer by name
- Make and maintain eye contact with customer
- Smile when communicating with the customer to help set them at ease
- Demonstrate good listening skills

Sales/Referrals:

- Sell bank services and refers business to the bank
- Stay current on and support marketing efforts
- Responsible for ensuring that individual calling goals are met

Work Performance

- Meet established attendance standards
- Adhere to operational procedures
- Take initiative – listen for opportunities to offer products/services
- Demonstrate techniques for establishing priorities
- Accurately enter data
- Take initiative – ask for additional work
- Offer suggestions to improve efficiency
- Answer the phone within 3 rings, identify dept, self and ask how you can be of service
- Adhere to confidentiality policy
- Follow guidelines for dressing appropriately and professionally

Technical Skills

- Adhere to all compliance, regulatory and auditing guidelines
- Enter application information (mutual funds, annuities, brokerage & fee-based accounts, life/health ins)
- Enter information from the financial planning questionnaire into the data base
- Be able to use financial planning software programs for entering data

QUALIFICATIONS

EDUCATION and/or EXPERIENCE

High school diploma or general education degree (GED); or related experience and/or training; or equivalent combination of education and experience.

INTERNAL EDUCATION

Keep current on learning about bank and investment services and products.
Successfully complete all assigned reading material and required compliance training.

LANGUAGE SKILLS

Ability to read and comprehend complex instructions, short correspondence, and memos; write correspondence; and effectively present information in one-on-one and small group situations to customers, clients, and employees of the organization.

MATHEMATICAL SKILLS

Ability to balance, calculate data and complete other entries; knowledge of spreadsheet basics or experience using accounting software.

REASONING ABILITY

Ability to follow written and oral instructions; be able to research situations and problem solve.

PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit/talk/listen; frequently required to use hands to finger, handle, or feel; occasionally required to stand, walk, and reach with hands and arms; occasionally lift and/or move up to 25 pounds. Specific vision abilities required include close vision and ability to adjust focus.

WORK ENVIRONMENT

The noise level in the work environment is usually moderate.

INTERPERSONAL RELATIONS

As a team member, regularly interact with co-workers; expected to take the initiative to help see that the work is done and to help research or solve problems; expected to adapt to changes in procedures; and offer suggestions for improvement.

COMPUTER - WEBSITE SKILLS

Must be able to navigate websites and complete online training, testing and applications.

COMPUTER SKILLS

Understand and be able to apply computer skills to communicate effectively within the organization using word processing to format letters or correspondence, set-up and maintain electronic folders/files; send/save attachments. Depending on the position, have a basic understanding of accounting software to develop reports and forms such as spreadsheets/tables.

Be able to use email for communication (internal and external) and access outside websites as well as interface with the bank's network.