

Web-Site Job Posting

Request Date: 02/04/2022 Branch or Dept.: Sandy Office

Position:	Financial Services Representative II
Date Available:	02/04/2022
Location:	38975 Proctor Blvd., Sandy, OR 97055
Status:	Full Time / Non-exempt
Monthly Salary Range	\$2900-\$3200 DOE
Schedule:	M-F 40 hours
Bank Contact:	Terri Elsberry, HR Officer
Phone Number:	503-668-2521
Fax Number:	503-668-7825
Physical Address:	38975 Proctor Blvd Sandy, OR 97055
Email Address:	telsberry@clackamascountybank.com

To request an application packet, please email telsberry@clackamascountybank.com

Clackamas County Bank is an Equal Opportunity Employer, including disability/veterans

At Clackamas County Bank, we take great pride in building a personal relationship with every customer, community member, and employee. A stronger relationship creates a friendly banking environment, a collaborative community, and an amazing work environment unlike other financial institutions.

We believe in fostering a family work environment to grow together, where every employee has their own identity. Powerful, dedicated employees help sustain that tight bond between our financial institution and the areas we serve.

Are you going to be the next remarkable person joining the Clackamas County Bank family?

See Job Description Below

Job Description Financial Services Rep II

SUMMARY

Independently market investment and insurance products and services.

MANDATORY REQUIREMENT

Background/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
- Successful completion of extensive product presentations and sales
- Crossed trained in administrative duties

Sales/Referrals

- Sell bank services and refer 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
- Demonstrate knowledge of product/services when explaining them to a customer
- 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
- Ability to work independently and complete sales without assistance

Technical Skills

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

QUALIFICATIONS

EDUCATION and/or EXPERIENCE

One year certificate from college or technical school; or three-six months related experience and/or training; or equivalent combination of education and experience desirable.

Have one year financial service experience and currently hold Life and Health Insurance Licenses and Series 6 or 7 Securities License.

INTERNAL EDUCATION

Keep current on learning about bank services and bank products. Successfully complete all assigned reading material and required compliance training. Complete all CE requirements to maintain licenses. Stay current with investment product knowledge.

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. Ability to produce marketing materials and explain products to customers.

MATHEMATICAL SKILLS

Ability to balance, calculate data and complete other entries; knowledge of spread sheet basics or experience using accounting software; willing to learn time value of money calculations and be able to use the financial calculator. Calculate cost basis and explain tax ramifications. Willing to learn time value of money calculations and use financial calculator.

REASONING ABILITY

Ability to follow written and oral instructions; research situations and problem solve; to differentiate between products and recommend best choice.

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/ reach with hands and arms; occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job 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 interacts with co-workers; expected to take the initiative to help see 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 and files; and 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.