

WCF Financial Bank

Job Description

Title: Customer Service Representative-Webster City
Reports to: Operations Supervisor
Status: Non-Exempt
Supervises: Non-Supervisory
Pay: Hourly
Revision Date: 06/2023

Purpose of Position

The Customer Service Representative supports the Bank and the larger community by providing personal banking assistance. Using outstanding customer service skills, this hands-on position serves the Bank and its many customers by carrying out measurable, structured activities that result in a win-win for the Bank and its customers.

Primary Duties

- Provide basic personal banking services, including:
 - Assisting existing customers with questions and concerns about their accounts, including account maintenance.
 - Engaging existing customers to help understand other ways that WCF may assist them with their financial needs.
 - Engaging potential customers to help understand their financial needs and suggesting the proper product(s) to meet those needs.
 - Opening new accounts for new and existing customers to include:
 - Checking Accounts
 - Savings Accounts
 - Certificate of Deposits (CDs)
 - Individual Retirement Accounts (IRAs)
 - Business Checking, Savings, and CD Accounts
 - Providing customer referrals to the loan department.
 - Ordering or depositing foreign currency for customers
 - Assisting customers with digital banking questions and concerns.
 - Assisting customers with fraud investigations.
 - Process incoming and outgoing wire transfer requests
 - Ordering checks
 - Supporting the receptionist by answering the telephones and assisting the caller.
 - Fulfilling other customer service duties as required.
- Perform all Teller duties:
 - Accurately processing account transactions such as deposits, withdrawals, check cashing, and transfers.
 - Assisting customers with renewing and redeeming Certificates of Deposit.
 - Assisting customers with redemption of US Treasury Savings Bonds.

- Daily balancing duties including their teller drawer, teller cash recyclers (TCR), ATM, and bank cash vault.
 - Processing ATM and Night Depository transactions.
 - Other customer service duties as required.
- Perform Back-Office duties as required such as:
 - Account reconciliation.
 - Exception Item Processing.
 - Bank cash ordering and depositing.
 - Account research.
 - Report review and monitoring.
 - Account maintenance check-back.
 - Other tasks and projects as assigned.
- Complete required annual training in a timely manner.
- Uphold and enforce all company policies and procedures.
- Follow policies and procedures as established by management and the Board of Directors.
- Support organizational and departmental objectives and perform other duties as assigned.

Qualifications/Requirements

- High School diploma or equivalent. Bachelor's degree preferred.
- Prior banking experience preferred but not required.
- Prior customer service experience strongly preferred.
- Enthusiasm, sound personal judgment, and strong problem-solving skills.
- A total focus on providing outstanding customer service.
- Effective verbal, written, and mathematical skills.
- Ability to perform basic computer functions.
- Ability to multi-task and prioritize.
- Willingness to embrace change including adoption of new technologies.
- Ability to uphold confidentiality.
- Willingness to promote a positive work environment.

Schedule

The bank is open 8:00 AM to 5:30 PM Monday through Thursday and 8:00 AM to 6:00 PM on Fridays. The bank's drive through is open 9:00 AM to 12:00 PM on Saturdays.

Customer Service Representatives will rotate the following shifts weekly:

- 8:00 AM to 5:00 PM Monday through Friday
- 8:30 AM to 5:30 PM Monday through Thursday
- 9:00 AM to 6:00 PM Friday
- 9:00 AM to 12:00 PM Saturday (each person works approximately 1 out of every 3 or 4 Saturdays)

NOTE: The Monday – Friday shifts include a one-hour unpaid lunch.