



**Position:** New Accounts Representative  
**Reports To:** Retail Operations Officer  
**FLSA:** Non-Exempt  
**Location:** Idaho or Meridian office

### **Position Summary**

The primary responsibility of the New Accounts Representative is to serve our clients either in person, via phone or other electronic communication by opening and servicing all types of deposit accounts and by offering our products to them in accordance with the organization's Mission Statement and Core Values. As a New Accounts Representative, you will be able to assist our customers with various types of transactions to include, but not limited to, offering check cards, e-statements, online banking, mobile banking and any other ancillary products. Representatives provide exceptional customer service and build relationships with new and existing customers so as to be able to refer them to the appropriate team member(s) or department(s) for service. The position requires interaction with Bank lenders, vendors and customers, and other Bank personnel on a daily basis. The position reports to the Retail Operations Officer.

### **Essential Functions**

- Open deposit accounts and related products following procedures for reviewing, approving or denying applications for consumer and business customers
- Assist with closing accounts as requested by customer or Bank initiated closures; I.e. NSF, fraud, etc.
- Open, renew or redeem Certificates of Deposit
- Assist with opening and servicing Health Savings Accounts (HSA) and Individual Retirement Accounts (IRA).
- Enter new account data and file maintenance into system
- Look for opportunities to offer additional products and services to all customers
- Issue Debit Cards, assist with customer inquiries, and research, resolve and maintain Debit Card disputes
- Complete scanning and/or electronic filing of account documentation daily or as needed
- Complete monthly reports
- Assist customers with routine transactions such as address changes or stop payments
- Assist customers with safe deposit box needs
- Research and resolve customer inquiries

- Be familiar with Bank's Credit Card program, Rapid Reserve program, Business Online Banking, Merchant Capture, Courtesy Pay (overdrafts) Program and other services
- Support Teller Group as needed by assisting with customer inquiries, scanning work and/or end of day processes
- Maintain knowledge of banking products and services
- Provide exceptional customer service while maintaining knowledge of Bank policies and procedures, applicable laws and regulations/compliance requirements including but not limited to the Bank Secrecy Act, the Patriot Act and the Office of Foreign Assets Control

### **Additional Responsibilities**

- Complete required Bank training annually
- Greet customers and answering incoming phone calls
- Willing and able to work at other location as needed
- Serve as a member on at least one Bank Committee
- Participate in a minimum of two Heritage Club events annually
- Participate in two Highlander Cross Country or Track events annually
- Participate in two community events representing TRB (approved by manager)

### **Skills and Competencies**

- Prior Banking experience preferred
- Minimum of one year customer service experience preferred
- Must be Bondable
- Computer proficiency required – ability to use internet, email and Microsoft Office Word and Excel
- Must be able to conduct oneself in a manner that promotes trust in the individual and our organization.
- High attention to detail and accuracy
- Must maintain confidentiality at all times due to the nature of information about customers and transactions
- Work cooperatively and respectfully with all Bank Team Members
- Self-directed –be able to fulfill the responsibilities of the position with minimal supervision
- Must be able to prioritize and organize responsibilities to maximize productive results

### **Physical Demands**

- Normal office environment
- Extended PC viewing, keyboarding with periods of sedentary work
- May be required to stoop, kneel, stand, walk, talk, hear, reach with hands and arms
- May be required to occasionally lift/move up to 30 pounds

The physical demands noted above are representative of those that must be met by an employee to successfully perform the essential function of the position. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

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Employee Signature

Date

July 2020

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Printed Name

July 2020