

**VERABANK
JOB DESCRIPTION**

JOB TITLE: **CFG Investments Staff Assistant**

DEPARTMENT: **CFG Investments**

INCUMBENT: _____

SUPERVISOR: **Program Manager**

FLSA STATUS: **Non-Exempt**

DATE:

JOB PURPOSE

To make a positive long term contribution to the growth and profitability of CFG Investments by:

1. Assisting CFG Investment Executives in providing excellent customer service to internal and external clients
2. Maintaining the quality and integrity of service provided to clients of VeraBank and CFG Investments
3. Assisting CFG Investment Executives in maintaining and growing client base.
4. Maintaining all books and records for customers accounts.

DUTIES AND RESPONSIBILITIES

1. Monitors the documents required to open and close accounts to ensure we are in compliance on each account.
2. Coordinates with investment company on daily movement of cash on a daily basis.
3. Monitors the transfers of assets out of investment company are done on a timely basis, then proceeds with closing account on appropriate system.
4. Works with clients either in person or on the phone with service or scheduling appointments for Financial Advisor.
5. All other job duties as assigned.

CONTACTS

Daily contact with supervisor, coworkers, and clients.

SPECIFIC REQUIREMENTS

1. High school diploma
2. Excellent oral and written communication skills.
3. Excellent customer service skills.

PREFERRED REQUIREMENTS

1. Familiar with the financial services including brokerage.
2. Familiar with banking and bank operations.
3. Two year college degree or equivalent experience
4. Three years financial industry experience.
5. Ability to work independently and as a team.
6. Excellent time management skills.
7. Knowledge of personal computer and related word processing and spreadsheet software.
8. Detail oriented.

PHYSICAL REQUIREMENTS

Office setting with moderately varied desk-oriented activity, with fatigue being relieved by opportunities to stand and move around in a comfortable environment. Work involves frequent and repetitive movements of the wrist and hand. Some lifting up to 30 pounds may be required.

NOTICE

1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
3. Ability means to possess and apply both knowledge and skill.
4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Bank needs, being in good standing, fully competent performance, and other non-discriminatory issues.
6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.
8. This position description does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.

Employee

Department/Division Manager

Date

Date