



Job Description Worksheet

Job Title: Client Services Representative

Date: 01/31/12

Reports to: Manager of Client Services

Department: Client Services

The statements requested below are intended to describe the general nature and level of work being performed by the employees assigned to this classification; they are not intended to be construed as an exhaustive list of all responsibilities.

POSITION SUMMARY:

This position will be responsible for end to end client support. The position will be responsible for client education, client trading support, platform troubleshooting, and product support. The candidate will be expected to work using calls, chats and email communications to ensure resolution to all customer requests and issues in a timely fashion.

ESSENTIAL JOB FUNCTIONS:

- Resolving client inquiries via email and phone and chats
- Work in a team oriented environment
- Client education
- Software support
- Ability to work in a fast paced and interactive environment
- Maintain a positive representation of Interbank through professionalism, courtesy, and by striving to exceed Clients' expectations.

KNOWLEDGE, SKILLS & ABILITIES:

The candidate will be expected to learn the trading platform in order to handle technical questions with regard to trading as well as software support. Candidate will be expected to be familiar with customer account procedures to assist with client inquiries.

EDUCATION & EXPERIENCE:

College degree preferred. Customer Service experience preferred. Financial services experience a plus. Candidate should be willing to work in a customer focused environment that is fast paced and challenging.

CERTIFICATIONS REQUIRED:

Will be offered opportunity to acquire Series 3 and 34 licenses if not currently held.

Qualified candidates should submit their resumes to jobs@tradestation.com