

## **TITLE: Account Services Representative I**

### **Position Purpose:**

An Account Services Representative will apply their strong communication and organizational skills to open and maintain accounts while fulfilling customer needs to insure customer satisfaction.

### **Essential Duties and Responsibilities:**

- Administer successful new account verification and setup- This will include following up with clients by email and phone
- Facilitate account changes including but not limited to: account set-up; authorized Limited Power of Attorney set-up and account maintenance.
- Organizing and maintaining all client paperwork and files
- Process requests and provide information
- Respond to client questions about accounts
- Process transactions and service client accounts in a timely and efficient manner utilizing proprietary Interbank FX technology
- Ensure availability to handle inbound call volumes and meet client needs
- Adhere to all scheduling and productivity requirements
- Providing "*world-class*" quality customer service
- Ensure that industry, company and legal guidelines and requirements are followed
- Exhibit an understanding of policies and procedures while complying with company guidelines
- Support "Ease of Doing Business" while minimizing risk to Interbank FX
- **Will be required to perform other duties as requested, directed or assigned.**

### **Education and Experience:**

- High school diploma or GED.
- At least 2 years of Customer Service experience (Financial field preferred).

### **Job Knowledge, Skills and Abilities:**

- Organized with a strong attention to detail
- Strong customer service skills- this includes excellent verbal, written communication and analytical skills
- Knowledge of financial/Forex industry preferred
- At least two years of experience in a financial services industry or call center environment preferred
- Ability to be flexible and adapt to a changing environment
- Demonstrate an eagerness to learn and have the ability to work independently or as part of a team
- Computer skills including e-mail systems and proficiency in Word/Excel

### **Employee Classification:**

- Non-Exempt

**EEO Classification:**

- Administrative Support Workers

\*We are proud to be an EEO/AA employer. We maintain a drug-free workplace and perform pre-employment substance abuse testing.