



Customer Service Representative

Role Overview:

The Customer Service Representative plays a critical role in the branch, handling teller transactions, opening new savings and checking accounts, CDs, and IRAs, processing loans, and assisting the branch manager and loan officers.

During the transition from Grand River Bank to Isabella Bank, the Customer Service Representative will receive training on both core banking systems, Fiserv and Jack Henry. They will help customers navigate the change to Isabella Bank by listening carefully, and providing clear, supportive guidance throughout the transition.

About the Role:

- Assists customers, in person or via phone, with aspects of opening and maintaining checking accounts, savings accounts, CDs, IRAs and provides other customer services as needed.
- Serves on teller line as needed.
- Cross-markets financial institution products and services as appropriate.
- May assemble and verify accuracy of loan documents. Checks documents for proper vesting, legal descriptions, closing dates and signatures.
- May assist in processing mortgage and installment loans by inputting necessary customer information and ensuring that loan files contain documents with proper signature, dates and other relevant data.
- Provides administrative assistance to the Branch Manager.
- Travel to other branches to assist with staffing may be required.
- Performs other related duties as assigned.

About You:

- Strong computer skills
- Strong verbal and written communication skills
- Good mathematical skills
- Enthusiastic, positive, outgoing personality
- Ability to work well in a group or independently
- Ability to multi-task in a fast-paced environment
- High School Diploma required
- Two Years banking experience preferred
- Experience opening new accounts preferred
- Loan documentation experience preferred