BankFinancial SM

Career Opportunity

August 21, 2009

Client Representative II
Job Posting #044-09

Location: **Chicago Ridge**
Hours: **Full-time**

Responsibilities: Possess strong sales skills. Position requires some outside sales activity. Exhibits and provides exceptional customer service. Establishes and builds customer relationships by selling Bank Retail and Business products. Takes applications for Consumer loans, provides customer follow up and closes loans. Sells Fixed Rate Annuities and make referrals of alternative investment opportunities to Wealth Management and Financial Assurance Reps.

- Works with Dedicated Wealth Management Reps. in the territory to identify prospects for Alternative Investment Products, develop sales strategies, and make sales presentation to qualified prospects.
- Maintains current and accurate records of all transactions and forward sales and referral reports in a timely manner.
- Maintains updated knowledge for products that have been approved for sales.
- Maintain continued education requirements.
- Participate in periodic Wealth Management sales meetings, training sessions and team development meetings.
- Evaluates the needs of potential customers and offers appropriate financial products and services. Performs the opening, maintenance and closing of accounts.
- Obtains and verifies new customer information to established new account relationships. Complies with U. S. Patriot Act. Follows all bank policies.
- Provides exceptional customer service. Meets and strives to exceed the standards established and outlined by management.
- Perform teller responsibilities. Maintains and balances a cash fund.
- Manages Safe Deposit Vault functions.
- Participates in and is responsible for completing assigned customer calls for all branch Calling Campaigns.
- Participates in Bank events, trade shows, Bank sponsored events and community events before, during and after hours as scheduled.
- Have advanced knowledge to process IRA transactions and verify Client Rep I work.
- May require opening and closing the branch.
- May perform supervisor overrides
- Attend training as scheduled.
- Position may require traveling between branches within the region.
- Other duties as assigned.

Qualifications:

- 1 – 2 years banking experience
- Knowledge of Alternative Investments and Licensed to sell Fixed Rate Annuities.
- Associate degree preferred or equivalent combination of education and experience.
- Insurance license as required by Division Manager
- Must be computer literate in MS Word and Excel.
- Must have a strong understanding and knowledge of all bank products and services.
- Must have good written and oral communication skills..
- Must have excellent customer service skills and have good time-management and organizational skills.