

Position / Title **Infinex Operations Assistant**
Department **NDIP**
Work Schedule **25.00 Hrs per Wk**

Part Time



Regular weekday schedule: 9am-2pm Monday thru Friday *

** May need to work evenings/weekends for special events/projects*

Under the direct supervision of the Infinex Financial Advisor, performs a variety of clerical duties to support the marketing, operations and sales efforts of the Advisors for the Bank's nondeposit investment products (NDIP) department. Successfully completes initial and on-going training programs, including on-line courses, to maintain a comprehensive understanding of pertinent topics as the Bank deems necessary from time to time.

Primary Responsibilities

1. Performs any functions necessary, within scope of authority and expertise, to provide the highest possible level of customer service and to increase the productivity and profitability of the Bank's nondeposit investment products operations.
2. Maintains high ethical standards while performing all duties in accordance with internal policies and procedures and within prescribed legal, regulatory and compliance guidelines.
3. Maintains customer records and files in an accurate and compliant manner; processes time-sensitive paperwork.
4. Tracks referrals and maintains calendar.
5. Contacts prospects to arrange appointments. Generates customer and prospect mailings.
6. Assists Advisors in promoting Infinex internally and externally.

Other Responsibilities Include

7. Operates as a team player, performing other tasks as requested to ensure the timely completion of departmental work and special projects and to assist at special events.

The above is a description of the ordinary duties of the position. It should be expected that from time to time other duties, both related and unrelated to the above, may be assigned and, therefore, required.

Position Requirements

- High school diploma, or equivalent. Degree in Finance, Economics or a related field is preferred with general banking and investment coursework/knowledge
- Must be accurate, organized, detail-oriented, and able to work independently to effectively prioritize and complete daily work
- Must have a friendly, helpful attitude and interact with others in a professional, courteous and ethical manner
- Must display effective and appropriate written and verbal communication skills
- Working knowledge of PC applications and software including word processing, spreadsheet, and email
- Able to effectively use various types of office equipment, including a computer, telephone and fax machine

Supervisory Scope

None