



Opportunity Profile

Customer Service Representative – 3

Peace Hills Trust, Westbank Regional Office

February 5, 2024

Company

Peace Hills Trust is Canada's largest and oldest First Nations owned federally regulated financial institution, and is also Canada's only independent Trust Company. Employing over 100 people, Peace Hills Trust provides personal and business financial services through a network of 9 Regional Offices and electronic services.

Peace Hills Trust is wholly owned by the Samson Cree Nation of Maskwacis, Alberta. Its Corporate Office is located in Edmonton, Alberta.

The Opportunity

We are looking for customer-oriented service representative who will ensure excellent service standards, respond efficiently to customer inquiries and maintain high customer satisfaction. A customer service representative will act as a liaison, provide product and services information and resolve any customer inquiries with accuracy and efficiency.

The **Customer Service Representative – 3** role is located in Westbank, British Columbia and is a first point of contact in relation to company product and services and provides administrative support to the Regional Office. You will process a variety of routine financial transactions including administering and processing clearing and rejected clearing (Cheques and Electronic Funds Transfers), Guaranteed Investment Certificates, Registered Retirement Savings Plans, Collection Items, Deposit Account Bank Confirmations, Bank Wires and General Ledger Reconciliations.

The role will provide an opportunity in improving your communication skills, gain valuable insight to financial customer service processes, build stronger relationships and ultimately establish our reputation as a company that provides excellent customer support with potential leading into future growth and career opportunities within in the company.

Responsibilities include:

- Identify and assess customers' needs to achieve satisfaction
- Build sustainable relationships and trust with customer accounts through open and interactive communication
- Provide accurate, valid and complete information by following company guidelines and security regulations
- Respond to customer inquiries; managing incoming calls and customer service inquiries in a timely manner
- Develop and maintain a thorough working knowledge of all company products and services
- Handle customer issues/concerns, provide appropriate solutions and alternatives within the time limits; follow up to ensure resolution
- Keep records of customer interactions, process customer accounts and file documents
- Responsible and reliable; and is able to perform well as part of a team and contribute on an individual basis

The Ideal Candidate

To be successful in this role, you should be an excellent communicator who's able to learn our clients' trust and offer excellent customer support in addressing customer needs.

A basic knowledge of retail banking products; including personal and business related bank account services and basic knowledge of registered products is preferred.

Be familiar with basic accounting and transaction processing systems is required and confident at troubleshooting and problem solving.

Qualifications and Requirements:

- Proven customer support experience or experience as a Client Service Representative is required
- Strong phone or direct contact handling skills and active listening
- Experience in client support systems or banking systems experience a plus
- Familiar with financial industry a plus
- Cash handling skills and experience is preferred
- Customer orientation and ability to adapt/respond to different types of customer experience
- Excellent communication and presentation skills
- Ability to multi-task, prioritize, exercise judgment and management time effectively
- Minimum 2 years in Financial or Customer Service experience or relevant training is a plus
- Must have knowledge in computer programs or familiar with Word and Excel
- High School Diploma or General Equivalency Diploma is required

To be considered for this exciting opportunity, please forward your resume to or download your resume via link:

Human Resources

Phone: 780.421.1606

Email: human.resources@peacehills.com

We appreciate the interest of all applicants however only those selected for consideration will be contacted.

Closing Date: February 16, 2024