

Investment Services Representative

"Being organized, accurate and helpful is very important in my position. I need to make sure the members are helped in a timely fashion. Knowing them by name is a bonus!"

What is an Investment Services Representative?

The Investment Service Representative (ISR) is a key position in the Investments department. As in all front line positions, the ISR is a familiar face at CWCU.

The ISR completes administrative duties which include clerical duties, verification of reports, posting and reconciliations in the areas of investments, estates, mutual funds and safety deposit boxes. In this position you will often deal face-to-face with our members and it is important to direct callers to the appropriate representative and ensure our members receive efficient and courteous service. In this position you will respond to member inquiries on all branch products and services and identify opportunities to cross sell or refer sales opportunities to other staff.

How can I become an Investment Services Representative?

Most importantly ISRs must have strong interpersonal, communication and organizational skills as well as a commitment to accuracy and attention to detail. Customer service experience and some knowledge of investments would help you to succeed in this position. We would also expect new employees to have experience with Microsoft Word, Excel and Outlook as these programs are used on a daily basis.