

Financial Counseling Service Representative II – Job Description Summary

Primary responsibilities are to conduct personal interviews and provide financial education to customers by performing the following duties and responsibilities within established policies, procedures and guidelines. Process all required documentation. Maintain strong knowledge of all products, services and overall operations through self-study of on-line literature, brochures, and manuals.

The complete job description covers the following topics:

- Essential duties and responsibilities
- Performance standards
- Qualification requirements
- Education and experience
- Language skills
- Mathematical skills
- Reasoning ability
- Other skills and abilities
- Physical demands
- Work environment