



JOB DESCRIPTION

POSTION TITLE: Business Services Officer

DEPARTMENT: Executive

LOCATION: Main Office

REPORTS TO: Chief Administrative Officer

FLSA CODE: Exempt

Summary:

Under general supervision of the CAO, but in accordance with established policies and procedures, the position is responsible for establishing and maintaining Padgett Business Services franchise, providing clients with Business Tax and Advisory services.

Responsibilities:

- Build and maintain commercial client base
- Assess clients business tax, accounting and advisory needs and establish accounts as appropriate
- Establish small business relationships including:
 - Tax preparation of business taxes
 - General ledger and bookkeeping services
 - Payroll services
 - Financial planning and other financial services
 - Business financial software
 - Government compliance
 - Small business advice
- Adhere to current Standards of Service Performance.
- Adhere to current compliance standards.
- Performs other related duties as assigned.

Knowledge, Skills and Abilities

- Excellent leadership, interpersonal, team and communication skills (written and verbal)
- Ability to establish credibility and rapport; is friendly and personable looking for ways to benefit the customer.
- Excellent communication and interpersonal skills.
- Proven ability to demonstrate and coach exceptional customer service.
- Ability to communicate and function professionally with all levels of personnel and business partners across the organization.
- Excellent customer contact skills; comfortable asking questions/ interviewing customers about their financial situation; strong listening skills
- Understand how to present features and benefits of product and services to customers with differing needs.
- Must stay current on operational, product, and system changes/enhancements, as well as demonstrate good risk management decisions.
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Training and Experience

- Bachelor's Degree or equivalent work experience
- 5+ years of experience providing similar services to organizations
- Proficiency with Windows and Excel
- Demonstrated sales/business development experience and success
- Fundamental understanding of profitability
- Complete ongoing compliance training

Compliance Training:

- Must complete ongoing compliance training on the Bank Secrecy Act, USA Patriot Act, Anti Money Laundering, Know Your Customer, OFAC, Suspicious Activity Reporting, Privacy, Consumer Privacy, Reg P, Right to Financial Privacy, Safeguarding Customer Information, Suspicious Activity Requiring FDIC Insurance, CIP, Do Not Call/Do Not Fax, Identity Theft, Anti-Tying.

Working Conditions:

- Must be able to sit/stand for long periods of time providing service to customers
- Unpredictable hours

NOTE: THIS JOB DESCRIPTION IS SUBJECT TO CHANGE AT THE DISCRETION OF BANK MANAGEMENT. POSITION HOLDER WILL BE NOTIFIED.