

## JOB DESCRIPTION

**Position:** Operations Service Representative, Registered Plans  
**Reports to:** Assistant Manager

**Group:** 2

---

### **Primary Responsibility/Basic Purpose:**

Under general supervision, the Operations Service Representative, Registered Plans is responsible for providing support in the processing and marketing of Registered Plans. Coastal Community strives "to be the leaders in building relationships that improve financial health, enrich people's lives and build healthier communities." It is the responsibility of the Operations Service Representative to carry the vision statement forward in order to build, maintain, attract and expand the member's relationship with Coastal Community. The Operations Service Representative provides friendly, professional service in an efficient and financially responsible manner.

### **Representative Duties:**

1. Accurately track and process T2033 documentation.
2. Process RRIF and related transactions.
3. Monitor and control the production of instant tax receipts.
4. Assist in maintenance of registered plan procedures, marketing, member seminars, and support.
5. Assist in preparation of statistical reports, and CRA year-end reporting.
6. Set-up and administer registered products.
7. Reconciles and remits withholding tax.
8. Prepare monthly reconciliation package for accounts assigned to Registered Support.
9. Performs other related duties and back-up service as required.

### **Required Qualifications:**

- Minimum of one year financial service experience or an equivalent combination of education and experience.
- Successful completion of CUIC 185 and/or CUIC 200.
- Successful completion of the MSR II course and exam.
- Advanced knowledge of all Coastal Community registered products and services.
- Solid working knowledge of all Coastal Community products and services.
- Solid working knowledge of the banking system.
- Solid working knowledge of the RPM system.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.
- Above average MSR/OSR skills.
- Demonstrated leadership skills.
- Excellent written and verbal communication skills.

### **Required Abilities:**

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations.
- Ability to multitask while providing quality service.
- Ability to complete projects and work within time constraints in a high paced environment.

### **Skills to Benefit this Position Include:**

- Customer Service Skills
- Time Management Skills
- Interpersonal Skills

- Problem Solving Skills

CONFIDENTIAL DRAFT