



## Why We Exist

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At the Trust Company of Tennessee, we believe everyone can live confidently and reach their financial goals. Would you like to be part of a team that works with individuals, families, businesses, and foundations to identify what success looks like and formulate a plan to get there? Come join our team of Wealth Management, Trust, Estate Administration, and Corporate Retirement Plan professionals who proudly help clients achieve their dreams.

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**Job Title:** Customer Service Representative  
**Reports To:** CSR Supervisor  
**Approved By:** CSR Supervisor  
**Classification:** Full Time – Non-Exempt

## Core Purpose

The Customer Service Representative is responsible for providing a high-level of customer service while assisting plan participants and TTC employees with questions regarding their retirement plans.

## Responsibilities

- Shows a commitment to The Trust Company's Mission, Core Values, and Client Promise.
- Ensures participants' questions and concerns are handled in a professional manner.
- Maintains positive relationships with participants and TTC employees.
- Answers employee questions regarding the features of their retirement plan/s.
- Takes distribution requests from plan participants and initiate the distribution process.
- Calculates the amount available for a loan and initiate the processing of the paperwork.
- Assists employees in using the retirement plan website.
- Provides participants and employees with their account balance and vesting percentage.
- Educates participants on distributions, rollovers, and general investment options.
- Assists participants with updating personal information as needed.
- Takes requests for retirement plan statements.
- Manages stressful situations pertaining conflicts with plan participants.
- Performs job functions with little supervision consistently meeting all deadlines.
- Contributes to overall department and corporate goals, interacting in a cooperative & positive manner.
- Special projects as assigned.

## Qualifications

- 1 – 3 years' experience in customer service
- Experience in call center role a plus
- Experience in retirement industry or related industry a plus
- Outstanding customer service skills
- Experience with multi-line phone systems
- Strong problem solving skills
- Strong interpersonal skills
- Strong verbal and written communication skills
- Ability to prioritize and meet deadlines
- Ability to work individually and in a team setting