

Registered Customer Services Representative (RCSR)

SUMMARY:

In addition to those duties and responsibilities normally performed by a Customer Services Representative (CSR), the Registered Customer Service Representative (RCSR) is fully trained and certified (NASD Series 6 and Series 63, where required) to sell select mutual funds and annuity products to organization customers on behalf of a registered brokerage firm, selected and endorsed by the organization.

Job Functions include: (Note: this is a representative list only - complete list provided with purchase)

- as designated and authorized representative of a brokerage firm, conducts sales and administrative processes related to providing selected mutual funds and annuities to organization's customers
- acts as CSR (customer service representative)
- is fully aware of all the products and services offered by the organization
- participates in continuous training and development

(also details Supervisory Responsibilities, Qualifications, Education and/or Experience, Language Skills, and work environment)