

Banking, Insurance, and Other Financial Clerks

Banking, Insurance, and Financial Clerks perform administrative and operational tasks that support the day-to-day activities of financial institutions and organizations. They handle transactions, maintain records, process claims, and assist clients, ensuring smooth and accurate financial operations. Their work is essential for maintaining efficiency, compliance, and customer satisfaction.

Duties and Responsibilities (Points):

- Process financial transactions such as deposits, withdrawals, and payments
- Maintain accurate records of accounts and financial activities
- Handle insurance claims, policy renewals, and client inquiries
- Verify and reconcile financial documents and reports
- Assist in preparing bills, invoices, and statements
- Support loan and credit processing by gathering necessary information
- Provide customer service and respond to financial queries
- Ensure compliance with banking, insurance, and financial regulations
- Use financial software and systems for data entry and management
- Report discrepancies and assist in audits or financial reviews