

JOB DESCRIPTION

Job Title:	Banking Specialist
Department:	Retail
Reports To:	Branch Manager
FLSA Status:	Non-Exempt
Salary Grade:	2

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Summary

This position serves as the “Customer Ambassador” for the bank with the overall purpose of providing quality and efficiency to customers who prefer face-to-face interaction with the bank. The Banking Specialist is a key member of our sales and service team.

Essential Job Duties

- Responsible for the expansion of existing customer relationships and the development of new business by proactively cross-selling a full range of products and services.
- Focuses on individual and department goals for revenue producing products for both sales and referrals to other departments.
- Thorough knowledge of all products and services and appropriate methods of presentation to the customer.
- Understands and utilizes the needs based sales process, including profiling customer needs and onboarding new customers to meet needs.
- Knowledge of Bank products and services and ability to sell products and services to the appropriate customer.
- Receives checks and cash for deposit/withdrawal, verifies amount, examine checks for endorsements, enter customers’ transactions into computer system and issue computer generated receipt according to Bank procedures.
- Performs a variety of additional teller transactions, including, but not limited to, loan payments, money orders, cashier’s checks, etc.
- Supports the company values with internal and external customers.
- Complies with all Bank policies/procedures and all applicable federal and state laws and regulations.
- Balances currency, coins and checks in cash drawer, ATM and night depository.

Required Qualifications – Required qualifications to effectively perform the job. An equivalent combination of education, training and experience will be considered. (Additional requirements may be designated by position.)



- High school diploma or general education degree (GED); one to twelve months of customer service experience; cash handling experience preferred.

Knowledge, Skills and Abilities – May be representative, but not all-inclusive, of those knowledge, skills and abilities commonly associated with this position.

- Working knowledge of Microsoft Office programs and other general office equipment.
- Ability to communicate effectively, both verbally and in writing.
- Excellent interpersonal skills and the ability to relate to a wide variety of people.
- Exceptional customer service skills and the ability to remain composed under pressure.
- Pleasant attitude and a welcoming demeanor.
- Ability to maintain reliable level of attendance and punctuality.

Work Environment – Environmental or atmospheric conditions commonly associated with the performance of the functions of this job.

- General office conditions with moderate noise levels.

Physical Abilities commonly associated with the performance of the functions of this job. The physical demands described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

- Frequently sitting performing sedentary office work.
- Repeatedly talking and listening.
- Regularly moving wrist, hand, and/or finger repetitively from computer operations.
- Ability to have clarity of vision at 20 inches or less, have precise hand-eye coordination and ability to identify/distinguish colors.
- Able to lift up to 50 pounds.