

Job Title: Client Services Banker

Reports to: Branch Manager

Job Summary: Our Client Services Banker position will enhance our customer retention by providing timely and accurate customer service while educating customers through effective oral and written communication on bank products and services. Additionally, the position will assist customers with problems or questions regarding their accounts; provide services to new and existing customers by promoting, selling, and opening bank deposit services, such as checking or savings accounts, CD's, IRA's, safe deposit boxes, etc. for both business and consumer customers. Requires thorough knowledge and familiarity of the various accounts and products offered by the bank.

Primary Duties/Responsibilities:

This list includes the current primary responsibilities of this position. It is not intended to be all-inclusive and is subject to change, as needed, for the purpose of operational efficiency and necessary reasonable accommodations.

- Represents oneself and the bank in a positive, courteous, friendly, and professional manner.
- Provides prompt, efficient, and accurate service in response to requests, inquiries, or problems concerning teller services provided by the bank.
- Builds and maintains relationships with customers to ensure full understanding of products and services offered.
- Opens business and consumer deposit accounts.
- Handles the process of ordering supplement items for customers such as checks, debit cards, etc.
- Assists customers with setting up and utilizing our online banking platform.
- Assists customers with processing and completing appropriate documentation for disputes, stop payment orders, verification of deposits, etc.
- Complies with all relevant regulatory requirements. (i.e. BSA large currency transaction reports, cashier's check logs, Reg CC holds on checks).
- Supports other frontline employees as needed.
- Follows bank policies and procedures.
- Performs other relevant duties as assigned.

Additional Duties/Responsibilities:

This list includes the additional responsibilities of this position. It is not intended to be all-inclusive and is subject to change, as needed, for the purpose of operational efficiency.

- Builds and maintains relationships with clients. Provides a superior level of service by identifying clients' needs, and recognizing and acting upon opportunities to refer and sell services and/or products provided by the bank.
- Provides prompt, efficient, and accurate service in selling, promoting, and opening bank services to new and existing clients.
- Assists clients with issues or questions concerning their accounts, explaining service charges, statement problems, product features, etc.
- Enters account data into Fiserv Premier Platform.

Education Requirements:

- High school diploma or equivalent required.
- Some college preferred.

Qualification Requirements:

- Excellent organizational skills.
- Excellent client service skills, including interpersonal and communication skills.
- Extensive knowledge and familiarity of the services and products offered by the bank.
- Ability to count and handle money accurately.
- Proficient computer skills.
- Friendly, outgoing, assertive, enthusiastic personality.
- Professional appearance and actions.

Experience Requirements:

- At least two years banking experience in the new accounts area, with excellent performance and balancing records required.
- At least one year of experience in the teller area.
- Previous customer service experience preferred.

Physical Requirements:

- May require long periods of standing or sitting.
- Ability to lift and carry cash drawers, coin bags, and boxes sometimes weighing over 25 pounds.
- May require long periods of typing and repetitive motion.