

<b>Job title</b>	<i>Personal Banker (SAFE Position)</i>
<b>Reports to</b>	<i>Client Services Manager</i>

### **Job purpose**

Personal Bankers respond to customer inquiries via telephone and face-to-face meetings. First point of contact for customers with needs beyond monetary transactions.

### **Duties and responsibilities**

- Assist customers with routine account-related requests such as: funds transfers, stop payments, inquiries about bank deposit products, loan products and service charges, inquiries about ATM and debit card usage and limits, inquiries about checking and savings accounts transactions, inquiries about funds availability.
- Research and resolve customer problems, acting as the customer liaison between other bank departments when necessary.
- Effectively assist customers with lending needs. Performing research, providing documentation, gathering financial documents and submitting new loan request.
- Research customer questions regarding electronic funds transfers and handle accordingly with internal departments and third party sources.
- Cross-sell bank products and services based on customer needs in accordance with the banks' program standards.
- Relate customer requests for service charge rebates to the appropriate channels.
- Process necessary paperwork to rebate customer service charges.
- Verify information on ATM/debit card applications to the information in customer database.
- Perform customer requested research, including printing statement and check copies.
- Act as backup to the teller line and branch manager.
- Assist head teller with dual control, money verification and cash replenishment activities.
- Escort appropriate bank personnel into the vault and maintain dual control for safekeeping access and official check and ATM card requisition.
- Open, set timers and close the safe deposit vault utilizing dual control.
- Contact customers to obtain necessary signatures on items with missing or irregular signatures.
- Maintain the bank's files for currency transaction reports, customer safekeeping receipts, loan and trust collateral receipts, commercial resolutions, powers of attorney, court orders, levies, miscellaneous deposit documentation and general correspondence.
- Adhering to all bank compliance standards.
- Provide a positive customer service experience on a regular basis.
- Will need to be a Notary

### **Preferred Qualifications**

Qualifications include:

- Good communication skills
- Bank deposit experience
- Lending experience
- NMLS (National Mortgage Licensing System) completed within 30 days

### **Working conditions**

This is a full-time position. Days and hours vary by branch.

This job operates in a clerical office setting, and routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets, and fax machines.

**Physical requirements**

This position requires manual dexterity, the ability to lift files and open filing cabinets. This position requires bending, stooping, or standing as necessary.

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<b>Approved by:</b>	
<b>Date approved:</b>	
<b>Reviewed:</b>	

