



**Straight Talk. Fair Deals.**

**Position Title:** Personal Banker I & II  
**Reports To:** Branch Manager  
**Department:** Retail Banking  
**Supervises:** Not Applicable  
**FLSA Status:** Non-Exempt  
**Grade Level:** Personal Banker I – Grade 19 (High School)//20  
Personal Banker II – Grade 21

**Position Summary:**

Personal Bankers provide excellent customer service in processing transactions such as deposits, withdrawals, check cashing, selling money orders, cashiers or travelers checks, processing loan/credit card payments and savings bond requests, handling cash advances and providing customers with both direct and telephone assistance. This position helps to build and maintain solid customer relationships. A Personal Banker understands the Bank's products and services and presents additional services as options to meet customer financial needs.

**Duties and Responsibilities:**

- Greets customers and facilitates a welcoming and customer-focused environment utilizing Integrity Customer Service principles.
- Processes customer transactions efficiently and accurately in a fast-paced environment while maintaining a balanced cash drawer and adhering to established Bank policies and procedures.
- Maintains acceptable cash balancing record.
- Generates new business and expands relationships with current customers by cross-selling bank products and services.
- Builds customer loyalty by developing relationships and offering exceptional customer service.
- Responds to customer inquires and concerns by researching and identifying positive solutions or referring to appropriate staff or department for resolution.
- Maintains a thorough knowledge of and performs end-of-day activities including branch proof.
- Removes deposits from, counts, and balances cash within the ATM's, recyclers and night depositories.
- Prepares Currency Transaction Reports and other reports required by law or regulation and ensures compliance with all regulatory requirements, bank policy and procedures.
- Maintains and ensures adherence to safety and security issues, policies and procedures.
- Utilizes the Bank's Customer Relationship Management tool to manage customer relationships and make necessary referrals.
- Attends and participates in training courses and workshops to advance products knowledge and customer service skills.
- Attends various functions/community events to enhance the image and presence of the bank in the market area as required.
- This position works in a rotating schedule on Saturdays as assigned
- May train for other functions within the Personal Banker area.

- Assumes additional responsibilities as assigned.

#### Additional Duties and Responsibilities for Personal Banker II:

- Opens standard new accounts and provides the proper follow-up to the appropriate departments; Opens and closes Safe Deposit Boxes; Processes CD renewals.
- Mentor less experienced Tellers and assists them with balancing problems.
- Orders supplies.
- Successfully completed Principles of Banking and Law and Banking through the Center for Financial Training and Education Alliance (CFTEA)
- Demonstrated proficiency in Electronic and Mobile banking products and applications.

#### **Education and Experience:**

##### Personal Banker I:

- High School Diploma or equivalent GED required (exception for high school branch teller)
- One year experience in retail banking, lending, sales, customer service and/or cash handling experience.

##### Personal Banker II:

- Minimum of two years of Personal Banker experience required and/or relevant experience in retail banking, lending, sales, customer service and/or cash handling experience.
- Demonstrated proficiency at Personal Banker I skills and responsibilities.

#### **Skills and Abilities:**

- Excellent customer service skills.
- Previous Teller and/or cash handling skills helpful.
- Outgoing, assertive, confident and enthusiastic personality.
- Strong multi tasking and communication skills.
- Excellent organizational skills and attention to detail.
- Demonstrated personal computer literacy.
- Must be dependable, flexible, a team player, professional and calm under pressure.
- Ability to work with little supervision.

#### **Working Conditions:**

- General office environment
- Physical surroundings are generally pleasant and comfortable
- Moderate lifting (to 35 lbs.) required. Moderate reaching, walking, sitting and standing required.

**External and internal applicants, as well as position incumbents who become disabled, must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on an individual basis.**