



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.