

TITLE: Personal Banker

FLSA: Non-Exempt

Reports To: Branch Manager

Summary

The Personal Banker is responsible for providing services to customers and prospective customers seeking consumer and small business loans, deposit products and services, and other bank financial services. The Personal Banker cross-sells bank services and participates in sales and business development activities. The position opens all types of new accounts.

Essential Functions

- Maintains a strong knowledge and understanding of appropriate banking laws, regulations, internal policies and procedures, and to comply fully with those laws, regulations, policies and procedures
- Becomes thoroughly familiar with the Bank’s consumer and small business loan and deposit products.
- Profiles new clients and opens new depository accounts. Actively sells or cross sells bank products and services.
- Provides assistance to clients and bank staff through prompt and courteous service and resolution of problems.
- Actively seeks the referral of clients and prospects for the sale and cross sale of additional products and services to other departments or sales staff.
- Maintain Relationship Management and Deposit Systems. Updates customer information such as address changes, new relationship manager assignment, etc.
- Be involved in community marketing efforts.
- Work as part of a team in a professional environment
- Perform other responsibilities as assigned

Skill Requirements

- Prior experience in sales and customer service
- Demonstrated ability to perform all over-the-counter customer services
- Must exercise accuracy, alertness, good judgment, courtesy, tact, and patience
- Good math skills are required, as well as the ability to communicate clearly and courteously

Physical Requirements

This position requires the ability to perform those activities necessary to complete the essential functions of the job, either with or without reasonable accommodation. Position may require frequent or continuous periods of talking, sitting, typing, repetitive motions of the hands/wrists, and good general vision and hearing. May also require occasional standing, walking, reaching, feeling, grasping and handling, and the ability to lift or carry up to 10 pounds.