Branch Relationship Associate

TITLE: Branch Relationship Associate	**REPORTS TO:** Branch Manager
DEPARTMENT: Retail	**FSLA**: Non-Exempt

JOB SUMMARY:

A Branch Relationship Associate is responsible for providing superior customer service, possessing excellent communications skills, maintaining general math skills, is detail orientated and able to function in a changing environment. Responsible for conducting customer financial transactions including but not limited to check cashing, withdrawals, deposits. Developing new relationships with clients and opening accounts, referring and cross-selling of products or services and all other tasks as assigned. The Branch Relationship Associate is responsible for responding to client issues and contributing to the branch goals as directed by Branch Manager. The Branch Relationship Associate is a float position and will be required to work in different branches as needed.

EXAMPLES OF KEY DUTIES: *(Duties are illustrative and not inclusive and may vary with individual assignment.)*

- Provides exceptional customer service to all bank customers (as defined by the Bank).
- Provides prompt, accurate, and efficient customer transactions; and handles all transactions for customers with discretion and confidentiality.
- Processes a variety of checking, savings and related transactions, i.e. receiving deposits, withdrawals, check cashing, loan payments.
- Accountable for balance of cash drawer(s) at the end of the day. Researches and resolves any balance discrepancies to balance within bank guidelines.
- Responsible for addressing and resolving customer inquiries in an efficient and accurate manner.
- Informs customers of new products and services, explaining features and benefits; and cross-sells products and services when appropriate and within scope of responsibility using a needs-based sales approach.
- Create client profiles and open all types of consumer and business accounts.
- Complete maintenance requests for clients.
- Outbound calling to local businesses.
- Works with branch management to resolve client issues.
- Answer inbound calls and respond to clients in a timely manner.
- Follows appropriate bank, regulatory and legal requirements, including BSA and customer identification programs.
- Able to move between platform and teller line, prioritizing the needs of both effectively.

The above statements are intended to describe the general nature and level of work performed rather than an exhaustive list of all duties and responsibilities and skills required for the position. The Job duties may be changed at any time at management's discretion. The job description is not intended to create an employment contract of any kind.

- Complete tasks in a timely basis as assigned by management.
- Performs other various duties as assigned.

QUALIFICATIONS:

Education:

- High school diploma or GED
- 1-3 years customer service experience/sales
- Previous teller or cash handling experience

Required Skills:

- Strong interpersonal communication skills
- Proficiency with Microsoft Office, Word and Excel
- General math skills
- Attention to details
- Excellent customer service skills
- Excellent organizational and time management skills
- Ability to build strong relationships with customers, teammates, internal departments and vendors
- Present a professional appearance

PHYSICAL DEMAND AND EQUIPMENT USED:

Must be able to sit, walk or stand for extended periods.
Must be able to travel to branch locations.
Must be able to travel for business related matters.
General Office environment
General Office equipment

LAST UPDATED: May 2024

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