

LIBERTY BANK

Personal Banker Job Description

TITLE:	Personal Banker	CATEGORY:	Full Time/Non-Exempt
DEPARTMENT:	Poulsbo Branch	REPORTS TO:	Branch Manager
SHIFT:	Monday 8:00 a.m.–5:30 p.m. Tues- Fri-8:30 a.m.-5:30 p.m.	DATE:	March 3, 2025

SUMMARY

The Personal Banker is responsible for developing and maintaining client relationships by processing transactions; assisting customers in their selection of various accounts and financial services; cross selling the Bank's products and services; opening, maintaining and closing all account types and performing branch clerical duties. Promotes the Bank by providing exceptional customer service. Refers customers to the appropriate staff for lending services. Supports the Branch Manager by ensuring branch operational activities run smoothly and efficiently and provides back-up support by cross-training in various operational areas.

Assures compliance with all Bank policies and procedures, as well as all applicable state and federal banking regulations, including BSA/AML.

ESSENTIAL DUTIES

1. Provide exceptional customer service; ensure consistent follow-through by taking ownership of issues.
2. Process a variety of client transactions, including teller transactions, ensuring consistent accuracy, and acting as a "Trusted Advisor."
3. On-board new customers, and assist with daily maintenance of deposit accounts, standard cash management products, debit and credit cards, online and mobile banking.
4. Become knowledgeable on Bank products.
5. Educate customer on Bank products.
6. Provided backup to the courier route, if needed.
7. Ensures the office is maintained in a neat, clean and attractive manner.
8. Participate in day-to-day operations for the branch as assigned, review, act on various reports and certifications.
9. Provide operational, compliance, and other support as necessary; provide support to other departments.
10. Proactive in professional development and in support of others within the department and bank.
11. Treat people with respect; keep commitments; inspire the trust of others; work ethically and with integrity; uphold organizational values; accept responsibility for own actions.
12. May represent the Bank at various community and civic functions to further enhance the Bank's image and develop additional business.
13. Follow policies and procedures; complete assigned tasks correctly and on time; support the Bank's goals and values; benefit the bank through outside activities.

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MINIMUM REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- High school diploma or GED (minimum requirement). Three years of related banking industry experience and/or training; or the equivalent combination of education and experience.
- Intermediate experience, knowledge and training in bank sales and service and bank teller operations.
- Customer service or cash-handling experience (e.g., retail, cashier, or hospitality) preferred.
- Basic knowledge of related state and federal banking compliance regulations and other Bank operational policies.
- Computer proficiency for banking software and data entry.
- Strong numerical and math skills for handling transactions accurately.
- Problem-solving skills.
- Effective oral, written and interpersonal communication skills with the ability to apply common sense to carry out instructions; ability to speak clearly to customers and employees.
- Effective organizational and time management skills.
- Ability to work with general supervision while performing duties.
- Current Washington driver's license and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.

ENVIRONMENT AND PHYSICAL ACTIVITY

While performing the duties of this job, the employee is constantly required to view computer screens, read reports, remain in a stationary position, and operate a computer and other office productivity machinery, such as a multi-line telephone, copy machine, scanner, fax, and computer printer. The employee needs to frequently communicate with internal and external contacts and move about inside the office to access file cabinets, office machinery, etc. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Climate controlled business office environment.
- Ability to work in artificial light for extended periods of time.
- Noise level is usually moderate.
- Work involves being able to concentrate on the matter at hand, under sometimes distracting work conditions and frequent interruptions during the day.
- This is a full time, in-person position: Monday through Friday; 40 hours per week.
- Work requires regular attendance, punctuality, and adherence to agreed-upon schedule with willingness to work a flexible and/or rotating schedule and/or extended hours, as needed.

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These above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed, as an exhaustive list of all responsibilities, duties and skills required of personnel so classified. Management reserves the right to change this position description at any time according to business needs.

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