



TITLE: Branch Operations Supervisor – Portland Office
REPORTS TO: SVP, Commercial Banking Team Lead
FLSA: Exempt
CATEGORY: Full Time
SHIFT: Monday – Friday 8:30am – 5:30pm

At Summit Bank, we help our clients and communities succeed and grow, provide a great workplace for our colleagues, and produce consistent, exceptional long-term results. Founded in 2004, we offer innovative solutions and unparalleled experiences for the best businesses in Oregon.

Clients, colleagues, shareholders and community members receive professional, friendly, caring and exceptional service that exceeds expectations.

As a Branch Office Operations Supervisor, you will serve our clients and the community. You will manage the day-to-day activities of client facing colleagues and be accountable for adhering to Bank policies and procedures, and all applicable state and federal laws and regulations of banking.

What you will do as a Branch Office Operations Supervisor:

Service and Operations

- **Process, resolve and communicate solutions for complex client transactions, problems or inquiries.**
- **Operate computer terminal or personal computer to process account activity, determine balances and solve problems within given authority.**
- **Review daily deposit work of each Client Service Representative outside of their deposit limits.**
- **Direct colleagues in preparation of uncollected funds holds (Regulation CC).**
- **Address colleagues in reconciling and researching transaction differences as related to general ledger accounts; ensures maintenance of accurate Client Service Representative balancing records.**
- **Participate in monthly certification process, including but not limited to surprise cash counts, branch cash limits, wire transfers, excessive withdrawals (Regulation D), and stop payments.**
- **Consistently apply decision-making techniques on inquiries, approvals, and requests as they apply to policies and procedures within assigned approval limits and uses these as opportunities for learning and employee development.**
- **Ensure all related paper and electronic file systems are maintained and documentation is consistent and complete.**

- **Focus on client retention by establishing and overseeing a quarterly client calling program.**
- **Supervise front-line colleagues, which includes but is not limited to approving schedules, time off requests, coaching, and performance reviews.**
- **Administer client accounts by opening and/or closing certificates of deposit, personal and business accounts, collecting all required documentation to ensure compliance with Bank, BSA and Patriot Act requirements.**
- **Support clients by ordering checks, savings bonds, and executing wire transfers.**
- **Provide operational support by checking and counting night drop, balancing cash vault, and processing cash shipments.**
- **Lead department functions in the absence of other colleagues and when additional capacity or expertise is required.**
- **Perform all cash and non-cash transactions maintaining the highest level of client service to serve our clients best.**
- **Directly respond to inquiries or refer them to the appropriate department or colleague, and follows up with all clients and/or colleagues involved.**

Leadership

- **Lead special projects; gather data and prepare reports for colleagues, examiners and other personnel.**
- **Work with team to develop policies and procedures that ensure adherence to state and federal regulations and to meet standard bank operating guidelines.**
- **Manage and hire new colleagues.**
- **Coach and develop colleagues with career advancement plans for front-line colleagues.**
- **Participate in internal committees coordinated with colleagues.**
- **Complete all assigned Compliance Training.**

General

- **Provide excellent personal client service to all internal and external clients.**
- **Treat people with respect; keeps commitments; inspires the trust of others; works ethically and with integrity; upholds organizational values; accepts responsibility for own actions.**
- **Follow policies and procedures; completes administrative tasks correctly and on time; contributes to the overall profitability of the Bank through cost controls and expense monitoring.**
- **Apply sound judgment in decision making and sees beyond immediate assignments and acts on opportunities and problem areas.**
- **Perform position safely, without endangering the health or safety to themselves or others and reports potentially unsafe conditions.**
- **Work according to established schedules, arriving on time and with a positive attitude.**
- **Support the Bank's goals and values; benefits the Bank through outside activities.**
- **Any other duties as defined by colleagues.**

You could be a great fit if you have:

These specifications are general guidelines based on the minimum experience usually 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 job satisfactorily. Specific abilities may result in some deviation from these guidelines.

- **Minimum of five (5) years of related experience and/or training; or equivalent combination of education and experience. Relevant work experience should consist of branch operations. Educational experience, through in-house training sessions, formal school or related curriculum, should apply to the banking and financial services.**
- **Exceptional organizational and interpersonal skills to interface with clients, prospects, and colleagues.**
- **Experience, knowledge, and training in progressively responsible branch operations activities.**
- **Advanced knowledge of related state and federal banking compliance regulations, Bank operational policies and procedures, and the Bank's products and services.**
- **Excellent organizational and time management skills to ensure maximum productivity; demonstrated ability in organization and delegation skills.**
- **Exceptional verbal, written and interpersonal communication skills with the ability to apply common sense to carry out instructions and instruct others, train personnel, write reports, correspondence and procedures, speak clearly to clients, employees, directors, and shareholders.**
- **Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.**
- **Ability to work with minimal supervision while performing duties.**

Acknowledgment

I have reviewed the above job description and acknowledge that I can perform the duties and responsibilities described herein. Summit Bank reserves the right to update job descriptions periodically. I recognize that this job description does not in any way create a contractual relationship, and does not alter Summit Bank's at-will employment relationship with me.

Colleague Signature

Date