



# SUMMITBANK

**TITLE: Business Banking Associate**  
**REPORTS TO: Market Development Officer**  
**FLSA: Non-Exempt**  
**CATEGORY: Full Time**  
**SHIFT: Monday – Friday, 8:30am – 5:30pm**

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## SUMMARY

**The Business Banking Associate will provide high-level administrative and operational support to the relationship banking, treasury and deposit team. Responsible for sales and business development support of the Bank's treasury management products to established and targeted prospective clients. Performs a variety of duties including, but not limited to, client related transactions, report generation and maintenance, document preparation and processing.**

## ESSENTIAL DUTIES

- 1. Provides excellent personal customer service to all internal and external clients by treating people with respect; keeping commitments; inspiring the trust of others; working ethically and with integrity; upholding organizational values; and, accepting responsibility for own actions.**
- 2. Participates in business calls with colleagues and existing and prospective clients to promote and demonstrate treasury management products and services.**
- 3. Works closely with Business Development and Deposit Operations in attaining service charge and deposit goals and to solidify customer retention efforts by providing superior level of customer service.**
- 4. Performs, and tracks completion of demonstrations, setups and installations of all treasury management products and services.**
- 5. Prepares sales contracts and agreements; ensuring proper documentation and authorizations have been obtained.**
- 6. Completes regular monitoring and processing functions associated with the Bank's Treasury Management products and services. Responds to questions and client service requests, interacting with the eBanking group to research and resolve system or client issues as needed.**
- 7. Provides relationship transition support of the Bank's treasury management products and services including but not limited to: ACH origination, remote deposit capture, positive pay, business bill pay, and business online banking.**
- 8. Open accounts across all product lines, utilize profiling process to pro-actively identify client current and future needs for financial services; provide documentation and follow-up to ensure that all needs are met; refer clients, as appropriate, to other business groups.**
- 9. Coordinates community events, sponsorships, officer coverage and identifies areas of opportunity within the community. Tracks various**

**community events, sponsorship/donation requests, tracking budget categories.**

**SECONDARY DUTIES**

- 1. Completes assigned Compliance Training.**
- 2. Maintains all related paper and electronic file systems so that necessary documents can be found easily, and documentation is consistent and complete.**
- 3. Assumes responsibility for various department functions in the absence of colleagues or in overload situations.**
- 4. Participates in various internal committees as assigned.**
- 5. Prepares call lists and identifies opportunities for the business development team.**
- 6. Provides back up support to the branch as a customer service representative.**

**GENERAL**

- 1. Provides excellent personal customer service to all internal and external clients by treating people with respect; keeping commitments; inspiring the trust of others; working ethically and with integrity; upholding organizational values; accepting responsibility for own actions.**
- 2. Follows policies and procedures; completes administrative tasks correctly and on time; contributes to the overall profitability of the Bank through cost controls and expense monitoring.**
- 3. Applies good judgment in decision making and sees beyond the immediate assignments and acts on opportunities and problem areas.**
- 4. Performs position safely and reports potentially unsafe conditions.**
- 5. Works according to established schedules, arriving on time and with a positive attitude.**
- 6. Any other duties as defined.**

**QUALIFICATIONS AND DEMONSTRATED ABILITIES**

**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.**

- 1. Associates degree in related field or equivalent combination of experience. Work related experience should consist of a minimum of three (3) years of experience. Educational experience, through in-house training, formal school or related curriculum, should be applicable to treasury management and online banking products and services.**
- 2. Exceptional verbal, written and interpersonal communication skills with the ability to apply common sense to carry out instructions, write reports, correspondence and procedures, speak clearly to customers, employees, directors, and shareholders.**

- 3. Advanced computer operation and technical skills; online banking, remote deposit, Microsoft Windows and MAC OS, word processing, spreadsheet, and core banking applications.**
- 4. Valid driver's license and available transportation to make client calls, demonstrations, and installations.**
- 5. Intermediate typing skills to meet production needs of position.**
- 6. Excellent organizational and time management skills.**
- 7. Ability to read, analyze, and interpret business periodicals, professional journals and procedures.**
- 8. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.**
- 9. Ability to work with minimal supervision while performing duties to handle confidential information with discretion.**

**PHYSICAL REQUIREMENTS**

- 1. Frequent walking to assist customers and staff members at various locations within and outside of the Bank.**
- 2. Frequently lifts and carries up to 30 pounds (scanners and other equipment).**
- 3. Frequently bends, kneels, stoops, reaches, and/or pushes and pulls when installing or maintaining equipment or opening and closing drawers and cabinets.**
- 4. Repetitive use of hands such as grasping, twisting/turning of wrists, and finger dexterity necessary to perform various duties such as using tools on equipment, typing, writing and maintaining files.**
- 5. Ability to sit for extended periods of time at assigned station.**
- 6. Continuous clarity of vision at 20 inches or less for normal processing of work.**

**ACKNOWLEDGEMENT**

**I have reviewed the above job description and acknowledge that I am able to perform the duties and responsibilities described herein. Summit Bank reserves the right the update job descriptions periodically. I acknowledge 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.**

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**Employee Signature**

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**Date**