



TITLE: Concierge Banker
REPORTS TO: AVP, Branch Manager
FLSA: Non-Exempt
CATEGORY: Full Time
SHIFT: Monday – Friday 8:30am – 5:30pm

SUMMARY

The Concierge Banker reports to the AVP, Branch Manager and provides over the phone client support. This position will identify the needs of clients and prospects for a variety of general banking services through a pro-active, needs-based sales approach. Responsibility will be to establish client rapport and trust by projecting an attitude of "friendly professionalism", in order to exceed the client's expectations. Assumes responsibility and is accountable for adherence to Bank policies and procedures, as well as all applicable state and federal laws and regulations pertaining to banking.

ESSENTIAL DUTIES

1. Provides excellent personal and professional client 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. Answers 6-line phone system and appropriately responding to inquiries or referring inquiries to the appropriate department or person, and exhibiting the necessary follow-through with clients and/or colleagues involved.
3. Provides direct client service by answering a variety of questions in regard to accounts: e.g., account balances, transfers, change orders, stop payments, etc.
4. Performs basic client account maintenance.
5. Has a working knowledge of various departments and colleagues to direct client requests and inquiries.
6. Assists with various office duties.
7. Any other duties as defined by management.

SECONDARY DUTIES

1. Completes assigned Compliance Training. Maintains Compliance with the Bank's BSA/AML policies and procedures.

GENERAL

1. Provides excellent personal client service to all internal and external clients.
2. Treats people with respect; keeps commitments; inspires the trust of others; works ethically and with integrity; upholds organizational values; accepts responsibility for own actions.
3. 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.

4. Applies good judgment in decision making and sees beyond immediate assignments and acts on opportunities and problem areas.
5. Performs position safely, without endangering the health or safety to themselves or others and reports potentially unsafe conditions.
6. Works according to established schedules, arriving on time and with a positive attitude.
7. Supports the Bank's goals and values; benefits the Bank through outside activities.

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.

1. Ability to establish and maintain excellent working relationships with clients, managers, and colleagues.
2. Exceptional verbal, written and interpersonal communication skills with the ability to apply common sense to carry out instructions, speak clearly to customers, employees, directors and shareholders.
3. Professional and personable presentation, with the ability to maintain a high level of energy
4. Intermediate typing skills to meet production needs of the position.
5. Excellent organizational and time management skills.
6. Ability to work with minimal supervision while performing duties and to handle confidential information with discretion.
7. High School Diploma or equivalent preferred.

PHYSICAL REQUIREMENTS

1. Repetitive use of hands such as grasping, twisting/turning of wrists, and finger dexterity necessary to perform various clerical duties such as typing, writing and maintaining files.
2. Frequent use of arms such as pushing/pulling to open and close drawers and cabinets.
3. Ability to sit for extended periods of time at assigned station.
4. Ability to bend and/or reach, and to occasionally lift and carry up to 30 - 50 pounds (boxes of copy paper and/or files for storage).
5. 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 to 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.

Employee Signature

Date