

12. Respond to inquiries or refer inquiries to the appropriate department or person, and exhibit the necessary follow through with clients and/or colleagues involved.
13. Assume responsibility for special projects; gathers data and prepare reports for management.
14. Ensures all related paper file systems are maintained so that necessary documents can be found easily, and documentation is consistent and complete.
15. Assist Client Services Advisors with opening accounts across all product lines. Provide documentation and follow up support as needed to ensure that all needs are met.
16. Assist with administering client accounts by opening and/or closing certificates of deposit, personal and business accounts, and safe deposit boxes, collecting all required documentation to ensure compliance with Bank, BSA, and Patriot Act requirements.
17. Assist with monitoring and tracking client portfolios to further deepen banking relationship via additional products and services.

SECONDARY DUTIES

1. Assume responsibility for various department functions in the absence of team members or in overload situations.
2. Completes assigned Compliance Training. Maintains Compliance with the Bank's BSA/AML policies and procedures.

GENERAL

1. Provides excellent personal customer 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.
8. Any other duties as defined by management.

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. One (1) year Teller cash-handling and customer service experience.
3. Professional and personable presentation, with the ability to maintain a high level of energy.
4. Team oriented.

