GENERAL SUMMARY

Responsible for primarily handling teller transactions, providing operational support, cross-selling bank products/services, and resolving customer service issues. Process transactions with accuracy and efficiency while delivering an overall professional and exceptional customer experience. As needed, will open accounts and refer customers to other areas of the bank as appropriate. Follow regulations and bank security procedures to protect customers as well as minimize risk to the bank.

ESSENTIAL FUNCTIONS

Operations

- Perform deposits and withdrawal transactions.
- Reconcile and balance teller cash drawer.
- Process outgoing wires.
- Essential functions of Safe Deposit box (e.g. entry, opening, maintenance).
- Assist customers with problem resolution.
- Assist in ATM balancing.
- Detect and report fraudulent or suspicious activities by completing BSA reporting as required, Currency Transactions Reports or Monetary Instrument Reports.

New Accounts

- Perform all aspects of new account opening procedures for all bank products/services.
- Answer customer inquiries, make appropriate financial solutions and recommendations and assist with problem resolution.
- Perform customer service functions such as check orders, change of address, return mail processing, supersede signature cards, and other account maintenance changes.
- Maintain confidentiality of customer information as well as Bank proprietary information.

Sales & Service

- Identify sales opportunities to cross-sell bank products and services to ensure customers’ financial goals are met.
- Provide quality personalized customer service, maintain frequent customer contact to expand relationships and ensure customer retention.
- Maintain open communication with Bank business partners and make referrals as appropriate (e.g. Financial Advisors, Mortgage Loan Originators, Commercial Lenders).
- Proactively support branch new business promotions.
QUALIFICATIONS

- College degree in business, accounting or finance preferred or related work experience.
- 6-12 months of cash handling, customer service in a retail environment, or sales experience preferred. Banking experience is a plus.
- Desire to learn the banking industry, help others, and work in a professional environment.
- PC literate and typing proficient. Previous experience with data entry, 10-key, banking software, and Microsoft Word, Excel, PowerPoint and Outlook a plus.
- Detail-oriented and organized with good note taking and follow-up skills.
- Good oral and written communication skills – can write clear messages, initiate conversations, and talk to customers about products and services.
- Good listening and interpersonal skills – can listen without interrupting, seeks clarification, responds professionally, and keeps emotions under control in difficult situations.
- Ability to work independently and as part of team.
- Ability to give and receive feedback to improve skills and job knowledge.
- Can maintain good attendance and arrive consistently at scheduled start time.
- Bilingual English/Chinese (Mandarin or Cantonese) preferred.
- Able and willing to commute as required for business needs.

It is the individual responsibility of every employee to maintain a current awareness and understanding of appropriate banking laws, regulations, internal policies and procedures, and to comply fully with those laws, regulations, policies and procedures.

From time to time, employees may be assigned tasks or duties as deemed appropriate by their supervisors.

The 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 responsibility, duties and skills required of personnel so classified. EOE. Veterans/Disabled