

**VERABANK  
JOB DESCRIPTION**

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**JOB TITLE:** Concierge Banker

**DEPARTMENT:** Branch Banking

**INCUMBENT:**

**SUPERVISOR:** Regional Manager

**FLSA STATUS:** Exempt

**DATE:** December 27, 2022

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**JOB PURPOSE**

Serves as a mobile customer ambassador for the bank with the overall purpose of providing a variety of high quality and efficient banking services. Has a thorough understanding of the customer's transaction and relationship requirements and is able to effectively communicate all available options to them on a basic level. Educates customers about the bank's sales and service delivery options and refers the appropriate products and services that match the customer's needs. Processes basic customary transactions, such as receiving and paying out money and transactions involving negotiable instruments, and utilizes technological resources to assist the customer in an efficient, friendly and accurate manner. Provides personalized banking services to the bank's customers both inside and outside of the bank branch environment.

**DUTIES AND RESPONSIBILITIES**

1. With a clear and basic understanding of the bank's products and services and the customer or prospective customer's current relationship with the bank, offers the customer information on basic bank products and services that can benefit the customer and enhance their banking relationship. The relationship banker uncovers the customer's needs and then matches those needs to the appropriate bank product or service. For more advanced level products and services, makes a referral and introduces the customer to the appropriate internal resource for continued service. Abides by all policies and procedures with the additional security and procedural enhancements required by mobile branch banking services.
2. Provides professional and proactive customer service by assisting customers with new and existing account inquiries, and/or researching and resolving account problems. Establishes basic types of new accounts for customers and follows designated new accounts procedures.
3. Processes basic and customary transactions such as receiving and paying out

- money, transactions involving negotiable instruments, and other transactions by utilizing technological resources.
4. Maintains technical knowledge of bank processes, systems and policy and procedures for consumer products and services. Complies with all applicable laws and regulations.
  5. Processes customer requests including but not limited to temporary checks, debit cards, check orders, stop payments, wire transfers, change of address and loan payments.
  6. Provides support to the branch and lending staff with clerical and administrative duties as assigned.
  7. Serves as a personal consultant to customers and potential customers regarding optimal use of bank products and services.

### **CONTACTS**

Daily contact with customers, supervisor and co-workers, both in the branch office and as a mobile branch banker. Frequent contact with other bank departments in researching and resolving customer issues and in providing consultative advice.

### **SPECIFIC REQUIREMENTS**

1. Associates degree or equivalent experience.
2. Comprehensive knowledge of banking rules and regulations.
3. Excellent oral and written communication skills.
4. Experience in providing quality customer service.
5. Conflict resolution skills.
6. Professional appearance and demeanor.
7. Ability to use basic office equipment.
8. Ability to use personal computers and other bank provided technological resources.
9. Detail oriented and demonstrated proficiency and accuracy in processing customer requests and transactions.
10. Ability to multitask, prioritize, and effectively complete assignments with continued distractions.
11. Demonstrated proficiency in safe operations of a motor vehicle.

### **PREFERRED REQUIREMENTS**

1. Familiar with the bank's core platform system.
2. One year experience in a financial institution in a customer contact position.
3. Ability to work independently and as a team with excellent time management skills.
4. Knowledge of various banking departments.

### **PHYSICAL REQUIREMENTS**

Office setting with moderately varied walking, standing, and desk-oriented activity, with fatigue being relieved by opportunities to change positions and move around in a comfortable indoor office environment. Daily motor vehicle travel required. Required to lift and carry items weighing up to 25 pounds.

**NOTICE**

1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
3. Ability means to possess and apply both knowledge and skill.
4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Bank needs, being in good standing, fully competent performance, and other non-discriminatory issues.
6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.
8. This position description does not create an employment contract, implied or otherwise, other than an “at will” employment relationship.

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Employee

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Date