

Personal Banker I

Overview:

Personal Bankers at Exchange Bank will develop customer relationships, participate in business development activities and act as a subject matter expert in financial products. Assist with sales development, coaching and guidance customers in regards to new products, implementing customer contact campaigns, and other business development activities. Consistently introduce customers to Business Banking, Mortgage Lending, Investment Planning, and Bankcard products and services. The prime candidate would excel in a team environment while setting priorities and meeting deadlines.

Key Responsibilities:

1. New Account Opening.
 - Have a working knowledge of Exchange Bank products and be able to assist customers in finding the right account or service to fit their needs.
 - Work with customers by opening and transacting on their IRA and HSA accounts. Having a useful knowledge of IRA and HSA guidelines.
2. Resolve issues with banking services and accounts
 - Helping customers that call or walk into the bank with information on their current accounts while executing outstanding customer service in a timely manner.
 - Help the customer to resolve debit card disputes.
3. Present financial products and services to existing and prospective customer
 - With being a full-service bank, we want to make sure we are meeting the needs of our customers.
 - Having an active understanding of all products and services that will make you be effective in communicating the benefits to our customers.
4. Perform administrative duties
 - Have appropriate knowledge of Microsoft office
 - Being able to operate office equipment such as printers, copiers, and fax machines.
 - Have previous experience with financial software.
5. Actively participating in training
 - Attending weekly meetings to discuss current processes
 - Completing bank assigned training annually

Knowledge, Skills, Experience and Education:

Required:

- Bachelor's Degree or equivalent experience preferred
- Previous experience in a retail banking environment
- Excellent oral and written communication skills
- Critical thinking and creative problem-solving skills.
- Must possess a desire to meet the financial needs of our customers and community

Qualification requirements include meeting applicable financial responsibility, character, credit fitness and criminal background standards. Successful candidates must meet ongoing regulatory requirements including acceptable background investigation and credit report results.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran status, or disability status.