



## Relationship Banker

---

- Reports to: Becky Wright
- Supervises: No one

## Job Summary

---

The Relationship Banker plays a key role in providing retail banking services and products to customers. In addition to performing a variety of tasks associated with transacting customer requests and verifying the completeness of retail banking transactions, the Relationship Banker is in the prime position to develop new business opportunities with current and potential customers.

Assures compliance with all Bank policies and procedures, as well as, all applicable state and federal banking regulations.

## Essential Duties

---

- Open new deposit accounts, including compiling and preparing new account paperwork and applications
- Originate small consumer loans, including compiling and preparing new account paperwork and applications
- Responsible for monitoring and maintenance of their loans and deposit portfolio
  - Resolving any technical exceptions on accounts from opening
  - Monitoring and collecting overdraft and past dues on assigned accounts
  - Report to Loan Monitoring Committee and Board on delinquent and overdrawn accounts when required by policy
- Receive incoming customers and bank visitors
  - Assist customers with any inquires and requests they have on current accounts (*deposits, loan payments, statement requests, debit card, online banking, mobile banking, account research, disputes, IRA accounts, etc.*)
  - Identify the unmet needs of customers and offer appropriate products and services including investment services with Team Malara, Mortgage and Commercial loans, etc.
- Answer and assist incoming callers with questions and requests; route callers appropriately.
- Promote and cross-sell exciting products and services to current and potential customers to include joint calls with other departments
- Participate in community events to increase bank visibility and develop business opportunities.

## Essential Skills

---

- Communication / people skills
- Willingness to learn
- Organized
- Good time management
- Detail Oriented
- Technology Savvy
- Team player