

Position Title: New Accounts Representative I, II, III

Wage: \$14.00 - \$20.80

Reports to: Branch Retail Operations Officer

Category: Non Exempt

Position summary:

Open and maintain all types of new accounts and cross sell bank products and services to new and existing customers in a courteous, friendly manner. Performs a variety of clerical duties and provide excellent customer service to both customer and internal departments.

Essential Functions:

- Provide prompt, courteous and friendly service to new and existing customers. Assist customers in cultivating relationships with other departments that may meet the needs of the customer.
- Open and maintain all types of accounts (checking, savings, debit cards, time certificates, IRAs, online banking). Create, maintain and update customer information files. Process file maintenance in a timely manner. Review and work all required new account reports.
- Perform safe deposit functions. Prepare outgoing wire transfers. Perform a variety of clerical duties as assigned to the position.
- Answer telephone and written inquiries concerning customer account questions. Refer to the proper department if necessary.
- Other duties as assigned. Job descriptions and duties may be modified as deemed appropriate by management.

Performance Expectations:

- Adhere to all policies, procedures, and regulatory compliance issues of Cashmere Valley Bank. Manage time effectively, completing assigned duties with required deadlines. Successfully complete in-house and offsite training as required.
- Practice a high degree of professionalism and confidentiality with confidence and a positive attitude. Demonstrate a commitment to giving continuous quality customer service by meeting and exceeding the customer's expectations.
- Make decisions and solve problems utilizing the resources available. Keep all customer financial information strictly confidential.
- Maintain a high level of accuracy. Learn and retain the procedures required by regulatory agencies and Cashmere Valley Bank.
- Model and uphold the Mission Statement of Cashmere Valley Bank.
- Good attendance record and overall reliability is essential.

Relationship Expectations:

- Accountable to the supervisor/manager for fulfillment of job responsibilities.
- Has extensive contact with customer and the public.
- Contribute to an overall team effort by being an effective team player.
- Develop an effective relationship of cooperation and communication with supervisors and peers.
- A positive attitude demonstrating full support of the bank and its strategic goals is essential.

Job Requirements: High school diploma or equivalent. Strong interpersonal, written and verbal skills. Possess the capability of exercising independent judgment when necessary. Ability to learn and retain consumer compliance regulations. Ability to conduct oneself in a professional manner. Available to work between 8:00 and 6:00 pm, Monday through Friday and overtime as necessary.

Physical Requirements: This position requires manual dexterity, lifting files, and opening file cabinets. It also requires bending, stooping, and standing as necessary. Must be able to lift up to 10-20 lbs.

