

NATIVE AMERICAN BANK, NA  
Job Description

Job Title: **Financial Services Representative I, II, III**

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Reporting to: Branch Supervisor/Manager  
Status: Non-Exempt

**SUMMARY:**

Responsible for multiple branch operational functions as assigned for a full service branch bank, primarily sales, customer relations development and service, and informational accuracy in accordance with the Bank's mission, objectives, policies and procedures. Also responsible for one or more secondary branch functions which may involve lateral reporting.

**PRIMARY RESPONSIBILITIES:**

- Strongly knowledgeable and compliant of all company policies and related procedures and regulations.
- Interacts and interviews customers to determine financial needs to recommend the most appropriate products.
- Familiar with entire deposit product line, cash management services and loans, including benefits, services charges and restrictions.
- Cross-sells products and services to customer base.
- Obtains and assembles all required account documentation and boards new accounts.
- Provides a high level of customer service, in person, by phone and email,, and assists with resolving issues, banking and financial education and transactional research.
- Continually verifies and maintains customer CIP information to insure continuous accuracy.
- Recognizes and reports customer and working environment issues observed.
- Completes all required training successfully and in a timely manner.
- Conducts interaction with customers and staff in a courteous and professional manner providing prompt, efficient, and accurate service.
- Other duties as assigned.

**Secondary Responsibilities:**

- Teller Operations
  - Receives and processes account and monetary transactions and maintains a cash drawer at a teller station, adhering to all line processes and procedures.
  - Authenticates override transactions for other teller staff.
  - Performs proof imaging as-needed.
  
- Information Technology
  - Assists with acquisition, deployment and management of telecommunication systems and technical services to provide continuous operation and data security.
  - Provides training and technical assistance to staff.
  - Regularly monitors and reports to the CTO and Operations Manager the status of all systems and applications.

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- Facilities/Vendor Management
  - Monitors the condition of the building, furniture and equipment and assists in the coordination of maintenance, replacement and repair.
  - Tests alarm systems on a regular basis.
  - Contacts supply and service vendors, provides justification and coordinates usage.

QUALIFICATIONS:

- Bachelor's degree or equivalent work experience in bank/branch operations or related field.
- Possesses a thorough understanding of standard banking principals and branch operations, including deposits sales, customer service and transaction processing.
- Experience with standard office software, such as Word and Excel, email services and navigating within Windows environment.
- Strong communication and interpersonal skills.
- Information Technology and Facilities/Vendor Management require additional education and/or experience.