



Job Description
Texoma Community Credit Union

Date: May 2022
Job Title: Relationship Banker
Location: Sheppard Office, Southwest Parkway, Downtown
Hours: Available 7:30am – 6:30pm Mon.-Fri. and Saturday rotation 8:45am – 12:30pm
Salary: Based on Skills and Experience (structure: Base Pay + Incentives)
FLSA Status: Non-Exempt – Hourly
Reports to: Senior Relationship Banker

REQUIREMENTS

Candidate must have high school diploma. Must have excellent communication skills and dress in professional attire. Must be able to understand, discuss and guide members with their financial business in a confidential manner and to accurately follow instructions and to resolve member dissatisfactions. Must exhibit an optimistic, friendly, positive and up-beat attitude. Must be a self-starter, disciplined and meet deadlines consistently without being reminded. Accuracy, attention to detail and high organizational skills are required. Candidate must be able to stand to serve members during business hours. Candidate must be able to communicate following the chain of command, beginning with their immediate supervisor, when something appears irregular, and may be required to attend some out-of-town workshops.

ROLE

This position is the Member Ambassador for the financial institution with the overall purpose of providing quality and efficiency to members. This position will have a thorough understanding of the member's transaction requirements and be able to effectively communicate all available options to them. They will educate members about our sales and service delivery options and refer the appropriate products and services matching the member's needs. This position will also refer members to the appropriate source or channel to address their need. They will also be responsible for processing the regular transactions, such as receiving and pay out money, and keeping records of money and negotiable instruments involved in financial transactions in an efficient, friendly, and accurate manner. Provides personalized banking services to credit union members by performing the duties below.

Duties and Responsibilities include the following:

1. Receives checks and cash for deposit to savings and checking accounts, verifies deposit amounts, examines checks for endorsement and negotiability, and posts transactions into bank records via the core processor. Cashes check and pays money from savings and checking account upon verification of signatures and members account balances.
2. With a good understanding of the credit union products/services (deposit and lending) and the member's current relationship, offers information on products and services that can benefit the member and enhance their credit union relationship. Evaluates the needs of potential members and offers appropriate financial products and services.
3. Prepares and compiles all documentation required for the new account opening process, account closure of process, account changes, and loan processes or transactions. All documentation must be completed in a timely, professional, and accurate manner.
4. Troubleshoots and resolves member and internal inquiries in a timely, professional, and accurate manner. Informs and advises member of status or enhancements to current account productivity and suggests resolution on account disputes and other account activity.
5. Attend all mandatory staff and department meetings as scheduled.
6. Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

7. Other duties as assigned.

ADA Requirements:

Physical Requirements: Perform primarily sedentary work with limited physical exertion and occasional lifting. Must be capable of climbing/descending stairs in an emergency situation. Must be able to operate routine office equipment including telephone, copier, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable, and timely attendance.

Working Conditions: Must be able to perform work indoors in a climate-controlled shared work area with moderate noise. Occasional outside work may be required.

Mental and/or Emotional Requirements: Must be able to perform job functions independently and work effectively both on own and as part of a team. Must be able to plan and direct the work activities of self and others. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of member service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines/requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Nothing in this position description restricts management’s right to assign or reassign duties and responsibilities to this job at any time.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any specific period of time.

Texoma Community Credit Union is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Employee Signature:

Date:

Supervisor Signature:

Date:

Human Resources Director:

Date:
