



JOB DESCRIPTION: Lead Financial Service Representative

Reports to: Branch Manager

Objective:

This position will assist with the daily branch operations and responsibilities to maintain efficient operations of the office along with providing quality service to customers, through sales and service of Bank products, and building customer relationships.

Classification: This is a Full-Time non-exempt position.

Job Location: Hamilton Co., Westfield, IN -*Training will be in Kokomo, IN*

Essential Functions:

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Comfortable meeting with clients to open new accounts; probe for products/services needs via in-depth communication
- Experience in processing account transactions, new accounts
- Demonstrate sound judgement in the ability to problem-solve within established policies and procedures, with the understanding and compliance of all state and federal regulations and laws.
- Experience in ensuring compliance with all governing regulations, especially Bank Secrecy Act requirements including: Currency Transaction Reports and monitoring and reporting as appropriate any suspected suspicious activity. Also, knowledge of Office of Foreign Asset Control (OFAC) requirements.
- Ability to recognize cues for sales opportunities, identify unexpressed needs and referral opportunities.
- Ability to accept and perform new job responsibilities as needed.
- Ability to accept change when required in performance of job responsibilities.
- Ability to learn and utilize new technologies.
- Good oral and written communication skills in handling both employee and customer relations.
- Process transactions accurately and efficiently.
- Thorough knowledge of bank products and services.
- Ensure that Bank policies and procedures are adhered to.
- Be in compliance with Federal Banking laws and regulations
- Perform all job responsibilities with a positive approach at all times.

- Manage the security and safety of the branch.
- Ensure that the opening and closing procedures, (i.e. alarms, vault, balance ATM's, night deposits, etc.) and end of day balancing of branch are being completed and assisting when necessary.
- Complete daily, monthly, and quarterly operational and auditing functions and reporting.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Qualifications/Education:

- High School Diploma
- Minimum of three years of related experience