



FIRST NATIONAL BANK

JOB DESCRIPTION FORM

Division/Department	Retail
Location	Bainbridge
Job Title	Relationship Specialist/Relationship Banker
Reports to	Director of Retail Banking

Level/Grade	Type of position:	Hours <u>40+</u> / week
	<input checked="" type="checkbox"/> Full-time	<input type="checkbox"/> Exempt
	<input type="checkbox"/> Part-time	<input checked="" type="checkbox"/> Nonexempt

GENERAL DESCRIPTION

The position of Relationship Specialist is responsible for processing all new account transactions; assisting customers in their selection of various accounts and financial services; cross-selling the Bank's products and services; opening, maintaining and closing of all account types; performing clerical duties; promotes business for the Bank by maintaining good customer relations and referring customers to appropriate staff for new services. The position also requires you to be fully knowledgeable and skilled in the teller operations. Assures compliance with all Bank policies and procedures, as well as all applicable state and federal banking regulations.

RESPONSIBILITIES

1. Provides individual customized services to customers.
2. Assists consumer and business customers in their selection of various accounts, products and financial services available from the Bank; ensures cross-sell opportunities are presented by applying professional sales techniques.
3. Interviews customers to obtain information; establishes proper identification of new customers; determines need and extent of reference investigation.
4. Discusses, prepares, and processes documents related to the Bank's **ELECTRONIC BANKING** service.
5. Makes decisions regarding the opening of new accounts; assigns account numbers; completes forms requiring customer signature(s); checks credit history; accepts initial deposits; prepares all documents and items pertaining to checking accounts, savings accounts, certificates of deposit, and other products for processing.
6. Operates personal computer to process account activity, determine balances, and resolve problems within given authority. Uploads documents on the Bank's computer systems; and maintains files.
7. May represent the Bank in various community, civic, and community reinvestment functions to further enhance the Bank's image and develop additional business.
8. Responsible for BSA/CIP compliance through OFAC scanning of customers, assure CIP is followed and risk rating of borrowers is complete.
9. Cross- trained for teller operations.
10. Performs daily review of G/L deposit related accounts, maintains deposit accounts thru system maintenance, verifies and files documentation.
11. Other duties as assigned.



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JOB SKILLS	
<ul style="list-style-type: none">○ Completes work accurately and accomplishes more than one task at a time.○ Assumes responsibility for mistakes and failures.○ Behaves according to sound ethical and legal standards.○ Builds and maintains productive relationships with people throughout the organization.○ Works independently, quickly, and accurately, but know when to ask for assistance.○ Maintains composure in frustrating situations.○ Effectively responds to customer needs.○ Demonstrates appropriate discretion; keeps confidential information private.○ Demonstrates a consistently high level of professional judgment.○ Projects a good impression of the bank and its integrity	
OTHER DESIRED SKILLS/REQUIREMENTS	
<ul style="list-style-type: none">— Minimum of 1 years of banking experience— Minimum high school degree.	
EMPLOYEE SIGNATURE:	
APPROVED BY:	DATE: