

<b>Job Title:</b> Branch Assistant Manager (BAM)	<b>Last Revision:</b> 3/2016
<b>Percentage of Time Allocated:</b> 100%	
<b>Salary Grade:</b> 15	
<b>Department:</b> Branch Management	
<b>Reports To:</b> Branch Manager (BM)	
<b>Supervises:</b> Customer Relations Manager Leads (CRM Lead), Customer Relations Managers One and Two (CRM), Tellers, and Receptionist	
<b>FLSA Status:</b> Exempt	
<p><b>Summary:</b> Oversees the daily operations of the branch location to make sure policies and procedures are followed by performing coaching, training, monitoring, reporting, and correcting issues discovered. Conduct the BM job duties in his/her absence. Utilizing the "Customer Xperience" behavioral standards, provides excellent customer service, builds relationships with new and existing customers while making sure policies and procedures are followed.</p>	
<p><b>Job Requirements:</b></p> <ul style="list-style-type: none"> <li>• High school diploma or equivalent</li> <li>• Bachelor degree preferred but not required</li> <li>• Successful completion of in-house training programs</li> <li>• Minimum two years' experience in banking</li> <li>• Comprehensive knowledge of new accounts operations</li> <li>• Comprehensive knowledge of consumer lending</li> <li>• Supervision/leadership knowledge and/or experience</li> <li>• Basic math and problem-solving skills</li> <li>• Good understanding of financial products and services</li> <li>• Exceptional customer service and professional skills</li> <li>• Good organizational, telephone, and communication skills</li> <li>• Ability to multi-task, work independently, delegate, and make decisions</li> <li>• Average computer and keyboard skills including but limited to using Microsoft Word, Excel, and PowerPoint</li> <li>• Team Player</li> </ul>	
<p><b>Specific Job Functions:</b></p> <ol style="list-style-type: none"> <li>1. <u>Strategic Objectives</u> <ol style="list-style-type: none"> <li>a. Reviews executes, and practices objectives within SFSB's Strategic Plan</li> <li>b. Realize and support strategies developed through strategic thinking process and assist BM with integrating these back into the branch goals</li> </ol> </li> <li>2. <u>Branch Growth</u> <ol style="list-style-type: none"> <li>1. Assist BM with developing branch goals and budgets to aid in meeting profitability standards</li> <li>2. Assist BM with utilizing branch income and financial statements to improve performance and implement plans for meeting branch goals</li> </ol> </li> <li>3. <u>Building Customer Relationships</u> <ol style="list-style-type: none"> <li>a. Participates in activities for generating new business such as sales calls and special events</li> <li>b. Is a leader in community organizations, activities, and civic organizations</li> <li>c. Attends to the needs of customers and prospective customers on banking matters of the following types: <ul style="list-style-type: none"> <li>• Signs such items as cashier's checks</li> <li>• Provides notary services</li> <li>• Authorizes the cashing of non-routine checks</li> <li>• Cashes checks in excess of CRM's authority</li> <li>• Handles customer complaints related to the Bank's services, explains service charges, and follows through on misdirected items or errors.</li> </ul> </li> </ol> </li> </ol>	

- Greet customers by name, use name in conversation
  - Respond to customer inquiries within 24 hours, within one hour if it is an emergency
- d. Performs CRM duties daily following CRM Job Description, including recommending, explaining, and opening new accounts
  - e. Ensures ongoing sales, service, and products knowledge training within branch
  - f. Responsible for knowing and cross-selling bank products to help the customer obtain their financial goals
  - g. Work to improve overall customer Xperience with team
  - h. Utilizes SFSB's customer service relationship management software
4. Communication
- a. Interacts regularly with the BM to ensure that the branches operational priorities are aligned with the total Bank's direction
  - b. Reports at internal Branch meeting monthly
  - c. Is responsible for preparing and conducting weekly Branch huddles
  - d. Communicates with Branch staff regularly
5. Compliance
- a. Responsible for knowing and complying with all Bank policies and procedures that apply to the position
  - b. Responsible for knowing and complying with all Federal Regulations that apply to the position, including, but not limited to: Bank Secrecy Act (BSA), Customer Identification Program (CIP), Funds Availability (Reg CC) and Currency Transaction Reporting (CTR)
6. Supervision
- a. Assigns duties and determines work schedule for CRM
  - b. Establishes and helps to attain internal performance objectives for the CRM
  - c. Prepares and conducts at least monthly direct report's coaching sessions, including employee's scorecard
  - d. Prepares and conducts annual direct report's evaluations
  - e. Conducts Paylocity duties, direct report's schedules, time card adjustments, approves/denies PTO request, approves timecards in a timely manner
  - f. Recommends hiring, discipline, promotion, transfer, and termination of staff
  - g. Responsible for ensuring staff is trained in all area specified within each employee's job responsibilities (Job Description | Development Plan)
  - h. Prepares and conducts weekly huddles and monthly branch meetings
7. Security and Building Maintenance
- a. Assist BM with oversight of branch security, including but not limited to opening and closing of the branch, making security checks and proper maintenance of the facility, following SFSB's Security Program, Procedures, and Forms, refers to the Security Officer for guidance and direction if needed
  - b. Assist BM with oversight of branch office supplies, building repairs and maintenance following SFSB's Purchasing and Asset Capitalization Policy, Procedures, and Forms; refers to the Bank's Maintenance Manager for guidance and direction if needed
8. Branch Audits (requests assistance from BCRML or BRM as needed)
- a. Prepares the monthly Branch Audit Review and submits to the Compliance Officer
  - b. Prepares the quarterly Branch Audit (includes verification of bait money and surprise drawer audits) and submits to the Compliance Officer
  - c. Reviews new accounts for compliance, accuracy, and completeness
9. Additional Responsibilities
- a. Participates on SFSB's assigned committees
  - b. Coordinates PTO days with Branch staff to ensure Branch is accurately staffed at all times
  - c. Answer phone as needed
  - d. Vault duties following the vault procedures
  - e. Attends all required retail deposit training and meetings
  - f. Attends all required retail lending training and meetings
  - g. Performs other duties as directed by supervisor

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. While performing the duties of this job, the employee is required to use hands to handle or feel objects, tools or controls. The employee frequently is required to sit, reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk, climb or balance; and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. The noise level in the work environment is usually moderate to quiet.

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Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date