



Senior Customer Relationship Banker

Title	Senior Customer Relationship Banker (CRB)
Office	Sarasota
Reports to	VP Relationship Banker

Job summary

The Senior CRB is responsible for delivering quality customer service through mastery handling of the branch's retail and business accounts. This includes routine over-the-counter transactions, advanced and complex branch transactions and for recognizing and acting upon sales opportunities that present themselves during interactions with customers and potential customers. Plays a vital part in the development and maintenance of professional relationships with customers. The Senior CRB oversees the branch operational functions related to balancing, cash handling stations, ATM, internal control reporting, and security.

Complies with all federal and state laws and regulations as well as internal policies and procedures of Crews Bank & Trust including Crews Bank & Trust's Program for Community Reinvestment (CRA), and the Crews Bank & Trust's Code of Conduct. All employees are expected to comply with these responsibilities as they relate specifically to their jobs and their performance will be evaluated on the attainment of objectives set for compliance responsibilities.

Summary of Essential Job Functions

- Puts customer first, creates an environment that makes the customer feel valued and respected.
- Thorough knowledge of bank's products and services, for retail, business and convenience banking products/services, mobile banking and online banking.
- Open all types of personal and business accounts, prepare related documentation and input credit applications where applicable. Responds to customer inquiries and requests regarding account, and promotes services to provide convenience to the customer.
- Develops and refers to appropriate personnel/department as needed for Lending and Trust services.
- Process all types of teller transactions in an accurate and efficient manner for personal and business accounts according to bank procedures.
- Completes operational functions such as approving transactions, cash control, branch security, internal control following all bank procedures.
- Empowered to handle customer problems, service irregularities and complaints, suggesting resolution on account disputes and other account activity. Handles escalated customer situations in the absence of the VP Relationship Banker.
- Responsible for required reports, necessary dual controls and audits of branch cash stations, official checks, starter kits, vault, ATM, safe deposit boxes, etc.
- Strong knowledge of regulatory compliance requirements, including completing SAR's, CTR's, and Delayed Availability Forms. Activities must also be completed timely and accurately.
- Maintain a working knowledge of all BSA requirements and related policies and procedures established under the BSA program. Attend and complete all assigned trainings in accordance to your specific job duties. Report any possible suspicious activity to the BSA Officer or designee immediately for further investigation.
- Maintain working relationship with Data Processing, Bookkeeping, E-Banking, IT, Marketing, Accounting, HR and other shared services to maintain efficient operation of the branch.
- Provides input into performance reviews and may participate in conducting reviews with branch management. May participate in the selection/hiring process of CRB's.
- Perform other duties as assigned.



Education and Experience

- High school diploma or equivalent
- Associates or Bachelor’s degree in Business or related field a plus
- Minimum 3 years retail/teller banking experience required, preference with supervisory and operations experience
- Excellent customer service and communication skills, as demonstrated by previous experience interacting with customers and responding to requests
- Knowledge of basic accounting, with experience reviewing numerical information and balancing. Ability to accurately count and handle cash
- Desire and willingness to work in a collaborative, flexible and team oriented work environment
- Experience using Microsoft Outlook, Word and Excel
- Provide excellent internal and external customer service
- Professional appearance and attitude

Note the Following:

- All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
- Individuals who cannot perform some of the requirements because they pose health or safety risks to themselves or other employees might be excluded from this position.
- Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the incumbent is to possess the abilities or aptitudes to perform each duty proficiently.
- This document does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.
- Must be able to lift 25 pounds.
- Are you able to perform these job duties as outlined? Yes ___ No ___
- If not, are there accommodations the Bank can made so that you can perform the duties of this job? Yes ___ No ___

Please describe below:

The above statements are intended to describe the general nature and level of the work being performed by people assigned to this work. This is not an exhaustive list of all duties and responsibilities. Crews Bank & Trust Management reserves the right to amend and change responsibilities to meet business and organizational needs as necessary.

Crews Bank & Trust is an affirmative action/equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, religion, color, national origin, sex, age, status as a protected veteran, among other things, or status as a qualified individual with disability.