

TRUMARK FINANCIAL CREDIT UNION

JOB DESCRIPTION

Job Title: Branch Manager
Department: Branch Operations
Reports To: VP/Branch Operations Manager
FLSA Status: Exempt M/T 30
Prepared Date: April 2013

SCHEDULE: Hours vary according to each Branch.

<u>SALARY RANGE:</u>	MINIMUM	MID-RANGE	MAXIMUM
	\$54,427	\$68,034	\$81,641

ACCOUNTABILITY OBJECTIVE:

Responsible for the overall performance of the branch including all sales and performance goals. Implements existing policies and procedures and makes recommendations regarding revisions. Interacts with department supervisor to achieve credit union goals and superior member service.

RESPONSIBILITIES:

1. Ensures operational integrity including compliance in all policies and procedures
2. Responsible for achieving all sales, service and profitability goals
3. Coaches, trains and mentor existing staff and new hires, including sales and referring coaching for branch staff
4. Works with Field Representative to identify and correct potential audit issues and recurring exceptions
5. Assures Branch physical security; dual control, audits, compliance with regulatory policies and procedures
6. Perform employee evaluations with assistance from assistant managers; conduct counseling sessions with branch employees to improve performance or correct behavioral concerns as required.
7. Supports Call Center during high volume periods.
8. Appropriately uses signing authority and overrides.
9. Consistently provide superior service to both internal and external members beyond existing standards.
10. Presents monthly accomplishments at select supervisor meetings
11. Escalates service delivery issues appropriate to Branch operations
12. Analyze branch expenses and implement strategies to reduce overhead.
13. Participate in branch functions and community activities to promote credit union's image and growth
14. Direct the development and implementation and use of productive sales strategies and techniques
15. Responsible for opening and closing building utilizing knowledge of alarm system and provides after hours support for the alarm system and ATM
16. Advise and counsel supervisors, respond to inquiries and suggest improved methods of performing the job.
17. Stays current with the usage of technology such as i-pads and smart phones, demonstrating their usage in mobile banking to members while migrating them to alternative delivery channels when appropriate.
18. Coordinate work schedules with vacations and approved leaves of absence to ensure adequate service coverage is maintained within staffing levels.
19. Presentation of financial literacy program on an as needed basis pursuant to school and community relations schedule.
20. Assist in the development of marketing strategies and all branch sales activities

21. Responsible for loss prevention and protecting the Credit Union from controllable losses due to, but not limited to, identity theft, kiting, new account fraud, counterfeit check fraud, processing errors, teller differences and theft.
22. Work with HR with respect to recommendations for hires, terminations, promotions, transfers, performance appraisals, training and development, and interpretation of credit union rules and policies for department personnel. Conduct all personnel functions in accordance with applicable statutes.
23. Remains active in credit union training programs. Complete the position's present curriculum as outlined by completing the following – credit union annual required compliance training and the supplemental courses listed within the prescribed time. Follows policy and procedure daily to ensure compliant with current regulations.
24. Required to attend Bank Secrecy Act training annually
25. Completes all other tasks, assignments or functions as assigned and/or required.

QUALIFICATIONS:

Education/Experience: Bachelor's degree in business field and/or 5 years of branch or equivalent work experience with a financial institution in supervisory capacity.

Other:

- ☐ Ability to communicate effectively, both orally and in writing, with members and employees.
- ☐ Ability to facilitate meetings
- ☐ Strong public speaking skills
- ☐ Excellent listening and interpersonal skills.
- ☐ Excellent attention to detail and organizational skills with the ability to perform expeditiously and accurately without constant supervision and frequent interruption.
- ☐ Intermediate working knowledge of word processing and spreadsheet applications.
- ☐ Proficient financial aptitude.
- ☐ Thorough understanding of all products and services, features and benefits as well as associated procedural details.
- ☐ Excellent technical aptitude.
- ☐ Must possess good analytical and decision making abilities.
- ☐ Nature of position creates the possibility of temporary or permanent reassignments within TruMark Financial's branch office network.
- ☐ Must have excellent conflict resolutions skills.
- ☐ Being a team player that is considerate of other employees.
- ☐ Ability to multi – task under pressure.
- ☐ Maintain a professional appearance and demeanor.
- ☐ Previous experience in an aggressive financial sales environment required.
- ☐ Flex time may be necessary.

Language Skills:

Ability to read, analyze, and interpret compensation, tax, financial, legal, regulatory reports and documents. Ability to respond to common inquiries or complaints from members, regulatory agencies, or members of the business community. Ability to effectively present job related information to employees.

Physical Requirements:

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Must be available and willing to travel to such locations and with such frequency as the employer determines is necessary or desirable to meet its business needs. Must possess

sufficient manual dexterity to skillfully operate standard office equipment including but not limited to: a computer, typewriter, adding machine, facsimile machine, photocopier, and telephone.

A telephone device to enhance hearing will be provided if needed. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk, sit; use hands to finger, handle or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; taste or smell. The employee must occasionally lift and/or move up to 30 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

Availability Requirements:

Regular Hours and Attendance: Must maintain regular and acceptable attendance and be available to work your normal scheduled hours per week. Or such hours per week as TruMark Financial determines necessary to meet the members needs.

Overtime, Weekends and Holiday Requirements: Must be available to work overtime, weekends and holidays as TruMark Financial deems necessary to meet its business needs.

Work Environment:

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Employees must be able to relate to other people beyond giving and receiving instructions: (a) can get along with co-workers or peers without exhibiting behavioral extremes; (b) perform work activities requiring negotiating, instructing, supervising, persuading or speaking with others; and (c) respond appropriately to criticism from a supervisor. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.