

## **Finance Job Function**

### **Banking Mgt II**

**Grade:** 56

**Job Code:** F0556M

**Job Family:** Banking

**Job Family Matrix:** [Banking \(Finance\) Matrix](#)

### **Summary**

Manage the operations, sales and service provided at a branch. Serve as the primary point of contact for customers, provide high quality service, develop efficient operations and promote sales of products and services.

### **Core Duties**

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Manage operations of branch including customer service, branch balancing, physical appearance and security; ensure adequate personnel coverage for branch location; identify opportunities to streamline and improve processes and recommend changes in facilities, staffing levels, and branch hours
- Develop, communicate and achieve individual sales plans to increase member base
- Assist in developing retail products and services including vendor selection, writing policies and procedures and product changes
- Hold loan signing authority and act within established approval guidelines.
- Responsible for IRA plan management, including annual reporting requirements and mandatory distributions
- Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations

### **Basic Qualifications**

- Bachelor's degree or equivalent work experience required
- Minimum of 3 years' relevant work experience

### **Additional Qualifications and Skills**

- Knowledge of Microsoft Office Suite, intermediate excel skills
- Working knowledge of basic financial administration principles
- Demonstrated experience with financial systems and data query tools
- Supervisory Experience

### **Certificates and Licenses**

### **Physical Requirements**

- Ability to exert up to 35 pounds of lifting force occasionally

### **Working Conditions**

- Work is performed in an office setting