

## **Finance Job Function**

### **Banking Mgt IV**

**Grade:** 58

**Job Code:** F0558M

**Job Family:** Banking

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

### **Summary**

Manage banking operations, sales and services provided at multiple branch locations. Oversee consumer and mortgage lending services as well as saving products. Provide leadership to branch staff.

### **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
- Oversee and manage operations for multiple branches; measure and evaluate branch performance and recommend operational improvements, changes in facilities, staffing, etc. to meet customer needs and improve productivity
- Oversee security and physical appearance of the branches; develop and implement procedures to guarantee security and proper auditing of branches and tellers
- Develop, communicate and achieve individual sales plans to increase member base
- Collaborate with management regarding 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 7 years' relevant work experience
- Supervisory 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

### **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