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# Example of Branch Associate Job Description

Our innovative and growing company is looking for a branch associate. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for branch associate

* Continuously develop and update audit programs for the business units
* Assist with department or divisional projects and new initiatives related to risk management and compliance as required
* Assist branch staff in the understanding of compliance internal controls, policies and procedures where applicable
* Distribute and log special items to corporate departments, branch personnel, vendors, and customers as demanded by the specific department’s needs, such as sales quotes, brochures, department newsletters, periodic operations reports
* Maintain calendars and itineraries for branch personnel, arrange meetings/conference calls/travel
* Own personal development and achievement of required responsibilities and skills-based behaviors to obtain Universal Branch Associate Certification status
* Greet customers/prospects in the lobby, on the teller line, or on the phone
* Research and answer customer inquiries with the intent of enhancing customer retention and engagement
* Take an active role in educating customers on other banking channels other products and services - Leverage tools to recommend appropriate solutions in person, on the telephone, or via other channels
* Numerous Other Duties Related to the Branch

## Qualifications for branch associate

* Preference for individuals with experience in sales-related role
* Candidates with no relevant experience but have an aptitude for sales are welcome to apply
* We perform General Ledger closing activities on quarterly basis
* We prepare local financial statements and regulatory reporting
* We deliver presentations and financial analysis to Branch managers
* We provide financial information to top management to enable timely and accurate decision-making