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# Example of Universal Banker Job Description

Our innovative and growing company is searching for experienced candidates for the position of universal banker. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for universal banker

* Up-to-date and comprehensive knowledge of all related policies and procedures and rules and regulations across deposit and lending processes
* Deepens existing customer relationships through a variety of proactive sales and service initiatives which should be captures in the Bank's CRM
* Drives proactive sales conversations through inbound and outbound interactions
* Opens checking, savings, money market, retirement products and certificates of deposit accounts
* Partners with and/or refer business specialist, ie., loan officers, business banker, financial advisors to ensure specialized financials needs are met
* Responsible for daily cash & ATM proof
* Actively participates in all branch activities, including but not limited to
* Ability to effectively complete and pass all required quarterly/annual BSA training requirements
* Actively supports the Bank's community related initiatives in an effort to continue building the brand in all segments of the communities we serve
* Demonstrate knowledge of all retail bank products and services basic understanding of specialty product lines

## Qualifications for universal banker

* Creating a sense of continuity when introducing customers to Advisors by notifying Advisors of the customer’s arrival, facilitating introductions, and conveying relevant customer information to the Advisor
* This position requires sitting over 66% of the time
* This position requires Visual Acuity at 20 inches (or less) over 66% of the time
* Prior Universal Banking experience is a must
* Ability to float between all 3 of the bank locations (Newton/ Wellesley/ Boston)
* Cross sells bank wide products and services to clients by expanding the personal banking relationship to more complex needs (Benchmark mutual funds, lines of credit, letters of credit)