



Example of Personal Banking Representative Job Description

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Our growing company is hiring for a personal banking representative. 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 personal banking representative

- Process deposits, withdraws, payments
- Process cash advances
- Process month end reports
- Open checking, savings, CD and IRA accounts
- Answer the phone and direct to correct department
- Perform routine member transactions, including but not limited to deposits, withdrawals, loan payments, transfers, cash advances, credit card advances, check cashing, money orders
- Update and maintain proper member account information in computer system membership and agreement files
- Refer customers to business partners when applicable
- Evaluates and determines the financial needs of each customer, matches this to the appropriate Santander product or service and delivers the product or service in a manner which satisfies the customer
- Develops and deepens customer relationships by demonstrating ownership and resolving customer problems efficiently, and by turning servicing requests and routine transactions into sales opportunities

Qualifications for personal banking representative

- Responds promptly to customer inquiries

- Shows appreciation for others' help and lends a hand when needed to complete shared tasks
- Bilingual English/Cape Verdean Creole or Spanish Speaking Preferred
- Bilingual English/ Spanish or Portuguese Speaking Preferred