



Example of Personal Banking Representative Job Description

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Our growing company is looking to fill the role of personal banking representative. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for personal banking representative

- Identifies the financial needs of the customer at the transaction window and the platform desk
- Educates and engages customers in conversations regarding their current and future financial needs
- When needed, and as dictated by branch volume, processes routine customer banking (teller) transactions
- As one of the primary customer contact positions in a Santander branch, assists in maintaining customer relationships by identifying and understanding his or her financial needs
- Adheres to safe deposit box procedures/operations and guidelines
- Assists in exceeding service goals by minimizing Customer wait times and accurately and efficiently processing Customer transactions
- Educates and engages Customers in conversations regarding their current and future financial needs and educates Customers about Bank products and services
- Recognizes sales opportunities and cross-sells bank products by making quality referrals, meeting all assigned teller goals
- Validates transactions for system or operational changes to ensure operational integrity and compliance to all required regulations

Qualifications for personal banking representative

- High School diploma required (4 year college degree or equivalent work experience preferred)
- Basic understanding of banking or finance
- Good communication, problem solving, and organizational/time management skills required
- Proficient computer skills, use of Microsoft Office, and ability to navigate multiple systems without assistance
- Bilingual Spanish/Cape Verdean Creole Language Skills strongly preferred