

The **Commercial Banking Assistant/CSR** provides administrative support to *Bank Officers*, assisting with responses to client requests, scheduling appointments, gathering loan documentation and related reports as needed, and coordinating resources. Additionally, this position is responsible for proactively looking for opportunities to deepen and enhance existing relationships and establishing new client relationships; assisting with all service related issues; processing all new account transactions; assisting clients in their selection of various accounts and financial services; cross-selling the Bank's products and services; opening, maintaining and closing all account types; promoting business for the Bank by providing exceptional quality customer service; and performing branch clerical duties as needed.

The incumbent will perform duties in the following areas:

- Prepare and submit loan packages for underwriting, further approval, or closing, depending on type of loan and needs of officer
- Interact directly with clients and vendors to obtain necessary loan documentation (title companies, attorneys, business owners, etc.)
- Examine documents to identify missing, incomplete or inconsistent information such as signatures, notarization, initials, terms, etc.
- Advise the officer of client requests and seek officer approval in cases of fee waivers, overdrafts, etc.
- Coordinate responses among multiple parties as needed, serving as a single point of contact
- Prepare reports and distribute as appropriate
- Interview clients to obtain information and establish proper identification of new clients while determining needs
- Assist clients in their selection of various accounts, products and financial services available from the Bank
- Ensure cross-selling opportunities are presented by applying professional sales techniques
- Make decisions in regard to the opening of new accounts; assigning account numbers; completing forms requiring client signature(s); checking credit history; accepting initial deposits; preparing all documents and items pertaining to checking accounts, savings accounts and certificates of deposit for processing.
- Process wire transfers, credit card orders, address changes, check and deposit slip orders, endorsement stamp orders, stop payment/hold orders, debit card applications, and file maintenance
- Print temporary checks for use until ordered checks arrive, ensuring all client information is correct
- Provide exceptional customer service by answering client questions; investigating and correcting errors; and resolving problems or other issues
- Issue official checks
- Perform safe deposit duties by opening accounts, controlling access, assisting clients and processing affiliated reports (in certain locations)
- Present funds received from client to teller for initial deposits; determine funds availability and obtain receipt for client
- Answer telephones and direct calls to proper Bank personnel
- Assist other branch employees as needed and participate with branch opening and closing procedures as needed
- Perform other duties as assigned

MINIMUM QUALIFICATIONS

- High school diploma or equivalent; some college preferred
- 2+ years of Administrative experience; financial services environment preferred
- 4+ years of loan processing and new account opening experience required
- Experience interacting directly with executives/clients/vendors/management/directors responding to requests and researching/resolving issues
- Knowledge of loan documents, approval process and general Bank policies and procedures
- Proficient with Microsoft Outlook, Word, Excel and PowerPoint
- Experience coordinating shared resources and working successfully with team members
- Exceptional organizational and time management skills, as demonstrated in experience handling multiple tasks and client requests within deadlines