



Job Title: Universal Banker II/III – Customer Service Specialist Float

Position Purpose

The Universal Banker II/III - Customer Service Specialist Float is a highly skilled retail banking professional responsible for delivering exceptional customer service while performing a full range of banking transactions, account maintenance, and consultative sales activities. This role supports both the teller line and platform areas, serves as a resource and mentor for junior staff, and helps drive branch performance through strong operational knowledge, product expertise, and leadership presence.

The Universal Banker II/III – Customer Service Specialist Float consistently models the bank’s customer service standards, demonstrates sound judgment, and contributes to a positive, team-focused environment.

Essential Duties and Responsibilities

The following represents a list of essential duties and responsibilities; other duties may be assigned as required.

Customer Service & Relationship Building

- Serve as a primary point of contact for customers by providing professional, courteous, and efficient service.
- Conduct needs-based conversations to identify opportunities and recommend appropriate products and services.
- Assist customers with problem resolution, account inquiries, and complex transactions.
- Develop strong customer relationships to strengthen loyalty and deepen engagement.

Platform Responsibilities

- Open and maintain consumer and business deposit accounts, IRAs, online banking, debit cards, stop payments, Safe Deposit Boxes and other related services.
- Process account file maintenance, address changes, check orders, and account research requests.
- Assist customers with loan applications, loan payments, and general lending inquiries (as permitted by bank policy).
- Understand and communicate bank policies, disclosures, and regulatory requirements.



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Teller Line Responsibilities

- Perform a full range of teller transactions accurately, including deposits, withdrawals, loan payments and check cashing.
- Assist with vault cash, ATM balancing, and branch settlement as needed.
- Maintain cash drawer within established limits and adhere to dual control procedures.
- Support branch opening/closing responsibilities as assigned.

Operational Excellence

- Serve as an escalation point for teller and banker questions related to policies, procedures, and systems.
- Assist with branch audits, operational checklists, CTRs, SAR referrals, CIP/KYC requirements, and compliance tasks.
- Ensure adherence to security and regulatory standards, including BSA/AML, Reg CC, Reg E, and privacy rules.
- Assist with branch reporting, daily work review, and operational workflows to support efficiency and accuracy.
- Ability to learn and navigate the Bank's core processing systems, including Fiserv platforms (Teller, Premier, and BPM).
- Adhere to all Bank policies and procedures that are outlined in the Bank's Employee Guidelines, such as Work Schedules and Timekeeping.

Leadership & Team Support

- Mentor and support Universal Bankers, Tellers, and new hires by providing coaching and reinforcing best practices.
- Lead by example by demonstrating professionalism, accountability, and strong decision-making skills.
- Assist with training on new systems, procedures, or product updates.
- Act as a backup to the Assistant Branch Manager or Branch Manager when needed, including handling customer escalations and supervisory functions.
- Perform supervisory functions, including but not limited to supervisor overrides, check and wire approvals within assigned limits. Troubleshoot and resolve customer and internal issues promptly, professionally, and with a customer-focused approach.



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Core Competencies

- Customer Focus & Service Excellence
- Attention to Detail & Accuracy
- Problem Solving & Decision Making
- Teamwork & Collaboration
- Accountability & Professionalism
- Adaptability & Multi-Tasking
- Sales & Relationship Building

Minimum Required Technical Skills and Qualifications

- 2–4 years of retail banking experience, preferably in a universal banking or senior teller/banker role.
- Strong understanding of bank products, services, and operations.
- Demonstrated ability to build relationships, resolve problems, and provide exceptional service.
- Proficiency with banking systems, cash handling, and Microsoft Office suite.
- Strong communication, interpersonal, and organizational skills.
- Ability to work flexible hours, including Saturdays, based on branch needs.

Managerial Responsibilities

- N/A

Education/Certifications/Licensure

- High School diploma or equivalent required; college coursework in business or finance preferred.
- Keeps current on all product and service enhancements and changes.

Language Skills

- Ability to read, analyze and interpret general business, technology and professional journals, technical procedures and governmental regulations.
- Ability to write reports and business correspondence.
- Ability to effectively present information and respond to questions.
- Ability to communicate with customers.
- Ability to interact with all management and staff.



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Physical Requirements

The physical demands and environmental factors described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Ability to stand for extended periods and lift up to 25 pounds (cash drawers, coin, etc.).
- Ability to use standard office and banking equipment.
- Must be able to communicate utilizing a telephone.
- Must have the mobility to allow access to all parts of the office.
- Must be willing and able to learn all the necessary computer functions.
- Must be able to travel to other branches for training purposes and for staffing purposes.
- Must be able to see and read fine print. Employee will have close visual contact with a computer monitor constantly.
- While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee frequently is required to sit. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 25 pounds as noted above. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

Hourly Range: \$24.00-\$34.00/hour, actual compensation within the range will be dependent on experience, skillset, and ability to meet qualifications outlined in the above job description.

For more information on our culture and benefits, please visit our careers page:
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