

OLYMPIA FEDERAL SAVINGS AND LOAN**JOB DESCRIPTION**

TITLE: Savings Counselor /Universal Banker I

GRADE: 5

FLSA STATUS: Nonexempt

EMPLOYMENT STATUS: Full Time/Regular

REPORTS TO: Branch Manager

POSITION SUMMARY:

Responsible for opening, processing and servicing of all types of savings and deposit accounts. Use business development, referral and account retention skills to provide prompt and courteous service to customers. Efficiently and accurately conduct both basic and complex new accounts and teller transactions. Apply full, working knowledge of teller and lead teller positions and answer inquiries regarding products and services. Answer and advise others in more complex customer questions and situations, requesting supervisor's assistance only in the most complex situations.

ESSENTIAL DUTIES & RESPONSIBILITIES:

- Perform duties and apply full working knowledge of teller and lead teller positions, assisting those positions as needed.
- Open and process new account documentation in accordance with Association policies including the customer identification program.
- Research and prepare savings Verifications of Deposits in a timely manner.
- Prepare savings account loan documentation and assigned savings as requested.
- Perform notary services.
- Act as an Association check signer.
- May be responsible for Returned Item Management (RIM), vault operations, cash management and safe deposit boxes.
- May participate in the daily balancing and cash replenishment of ATM and assure work is done accurately and under dual control.
- Cross-sell Association products and services.
- Follow all Association policies and procedures.

KNOWLEDGE, SKILLS AND ABILITY REQUIREMENTS:

- Excellent customer service.
- Requires exceptional written and verbal communication skills including the ability to clearly communicate and explain complex banking regulations and documents.
- Ability to work with supervisors and fellow employees in a positive manner conducive to a team effort.
- Ability to exercise customer confidentiality and discretionary judgment.
- Demonstrated ability to accurately handle cash and numerical transactions. Arithmetic ability to perform basic calculations involving the use of decimals and percentages.
- Ability to read, write, speak and understand English well.
- Strong organizational skills and ability to prioritize tasks.

- Basic PC and Microsoft Office proficiency, with an ability to learn new software.
- Ability to work well under pressure and in a fast-paced environment.
- Maintain a working knowledge of applicable Association Policies and Federal Regulations including, but not limited to, Bank Secrecy Act, Customer Identification Program, Office of Foreign Assets Control, Privacy, Rights to Financial Privacy, Community Reinvestment Act, Truth In Savings and The Security Program.

QUALIFICATIONS:

- Requires High school diploma, GED or equivalent skills.
- At least one year's experience in the financial industry or a related field with demonstrated ability to perform the function of teller.
- Prior customer service and cash handling experience required.
- Must be bondable.

PHYSICAL DEMANDS & WORK ENVIRONMENT/CONDITIONS:

Duties are performed in usual office conditions. Ability to operate standard office equipment including personal computer, standard keyboard, 10-key calculator and work a standard shift with repetitive wrist and hand movements. Ability to talk and hear. Ability to stand or sit for extended periods of time. Occasionally lift, move or carry items up to 15 lbs. Ability to concentrate on the matter at hand, under sometimes distracting work conditions. Requires manual dexterity and handling ability. Use hands and arms to finger, handle, grab and reach. Specific vision abilities including close vision and the ability to adjust focus. Work may involve eye strain due to constant use of computer screens. Occasional walking, kneeling, stooping, crouching, and bending. Ability to be mobile office-wide for various business needs.

The statements contained herein reflect general details as necessary to describe the principal functions of this job, the level of knowledge, skills and abilities typically required, and the scope of responsibility, but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload. The physical demands and work environment and conditions 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.

Updated: 2/14