



## Job Description

**Job Title:** Client Service Representative  
**Department:** Branch

**Reports To:** CSO/Supervisor  
**Classification:** Non-Exempt  
**Travel Required:** Negligible

**Summary** Responsible for delivering superb customer service experience to our banking customers. The Client Services Representative must go beyond handling customer transactions in a timely and professional manner, to engage customers and optimize ways to maximize their banking experience.

**Essential Duties and Responsibilities** include the following.

- Processes customers' deposits, withdrawals, cash advances, stop payments, blocks, wire transfers and any other transaction needed by the customer
- Recommends bank services that would be beneficial to customers
- Answers phones and performs account research and mails receipts to customers
- Promotes and maintains positive relations with all contacts, customers and potential customers
- Complies with all department and company policies and procedures
- Contributes to the fulfillment of department and company objectives and goals
- Orders, receives, verifies and distributes cash
- Operates teller's window to serve customers
- Admits customers to safe deposit boxes
- Makes a concerted effort to solve customer issues
- Follows teller over/short policy
- Pulls and scrutinizes various reports as per instructions of Supervisor
- Ensures courteous, efficient service, assists customers with inquiries, and resolves customer complaints
- Will adhere to and comply with all United States Federal and State Regulations including the Bank Secrecy Act, Anti-Money Laundering Act, USA PATRIOT Act, and OFAC laws and their implementing regulations.
- Regular attendance is an essential function of this position.
- Performs duties to ensure proper identification and information gathering of all parties' subject to SBIC's Customer Information Program (CIP) and Customer Due Diligence Programs.
- Maintains proper security controls regarding currency and negotiable instruments. Reviews reports in order to adequately identify and report all cash transactions and monetary purchases as required by the bank's BSA/AML reporting and recordkeeping procedures.
- Detects Suspicious Activity and files required reports to the BSA Officer or designee as found.
- Other duties assigned by the supervisor or branch manager that are appropriate to the position.

### **Supervisory Responsibilities**

This job has no supervisory responsibilities.

**Work Environment**

The job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopies, filing cabinets and fax machines.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk, use hands or finger, handle or feel; and reach with hands and arms.

**Other Duties**

Please note this description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

**Qualifications** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience**

High School Diploma or equivalent; or one to two years related experience and/or training in banking or high-volume cash handling environment; or equivalent combination of education and experience.

**Other Skills**

Demonstrated customer service experience

Demonstrated skill in use of computers

Ability to work branch hours, including weekends and some evenings

**TO APPLY:**

If you would like to apply, please submit a cover letter referencing the job title, resume, three professional references (names/contact information) and send to:

[careers@sbical.com](mailto:careers@sbical.com)

Fax: 213.489.4560

Documents submitted via email as attachments must be in Microsoft Words or pdf format. Resumes that do not reference a specific job title in the cover letter or email subject line will not be considered.