

# Assistant Branch Manager

Non-Exempt | (\$40,000 - \$57,731)

## OVERVIEW

The Assistant Branch Manager is responsible for assisting the Branch Manager in the overall branch management. The Assistant Manager may step in for the Branch Manager in their absence. The Assistant Manager supports efforts to maximize revenue, sales, and member satisfaction, minimize operational losses, deepen existing relationships, and minimize member attrition. In addition, the Assistant Manager contributes to implementing promotional campaigns and product initiatives at the branch level.

## DUTIES AND RESPONSIBILITIES

**20%** Assist the Branch Manager with the branch's daily operations, including scheduling staff and answering questions about products and services, policies and procedures, or rules and regulations.

**20%** Assist in training, directing, and monitoring attendance. Monitor performance and make recommendations to the manager for evaluations. Works with branch personnel to improve cross-selling and balancing skills and to provide updates on policy and procedure changes.

**15%** Ensure all branch transactions are balanced at the close of each day. Oversee individual accountability for the handling of cash and assist in resolving balancing issues. Balance operational controls to minimize risk to the Credit Union. Perform surprise cash audits. Conduct pre- and post-closing loan reviews originated by branch staff.

**15%** Assist manager with recruiting efforts to include performing pre-screening and interviewing for open positions and make recommendations to the manager.

**10%** Process loan applications through Consumer Lending. Schedule and conduct loan payouts of approved loans.

**10%** Investigate and resolve member complaints and research member situations to resolve issues, including but not limited to concerns with fees and loan servicing.

**5%** Assist the Branch Manager with branch security at all levels, including opening/closing of the facility, vault, and safe deposit boxes.

**5%** Perform other duties as assigned.

Must comply with all company policies and procedures, applicable laws, and regulations, including but not limited to the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

## EDUCATION AND EXPERIENCE

### Experience

Minimum of 2 years' of similar or related experience required  
3+ years' in a management role preferred  
5+ years' customer service experience preferred

### Education

High school diploma or GED required.

### Skills

An Assistant Branch Manager should possess a significant level of trust and diplomacy to include the following interpersonal skills:

- Communicate in-depth with members, staff, and third-party vendors
- Thoroughly explain account, loan, and other Credit Union policies and procedures
- Review and maintain confidentiality for highly sensitive financial/personal information

Overall ability to motivate, influence, educate, and advise others on a variety of business-related concerns.

## ADA REQUIREMENTS

Individuals must perform primarily sedentary work with limited physical exertion and occasional lifting of up to 50 lbs. Must be capable of climbing and descending stairs in an emergency. Must operate standard office equipment including computer, conference room monitor, telephone, copier, facsimile, and calculator. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

## ACKNOWLEDGEMENT

This job description is not a contract and should not be presumed to guarantee employment. Infuze Credit Union is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, gender, national origin, disability, age, or any other category protected by law.

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**EMPLOYEE SIGNATURE**

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**DATE**

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**AUTHORIZED REPRESENTATIVE**

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**DATE**