



Branch Manager I

Exempt | Salary (\$49,320 - \$71,120)

OVERVIEW

The Branch Manager reports to the EVP/COO and is responsible for managing the branch to ensure quality member service. Specifically, Branch Managers oversee staff to ensure efficient and error-free account transactions, loan applications, and new account implementation. In addition, Branch Managers problem-solve within established policies and guidelines.

DUTIES AND RESPONSIBILITIES

- 20%** Create and maintain a cross-selling environment within the branch. Monitor key products and sales within the branch to ensure profitable and sound business practices and high quality member service.

- 20%** Apply and evaluate policies and procedures for the branch. Ensure branch compliance with federal laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.

- 15%** Support a highly motivated, well-trained staff, ensuring positive employee relations. Evaluate job performance of branch staff to ensure quality of work and extraordinary member service.

- 15%** Monitor branch activity, including transaction volume, teller errors, loan volume, individual staff sales, and new accounts. Assist staff and members with complex accounts/loans.

- 15%** Conduct loan interviews. Process, approve and/or close loans. Must maintain current Mortgage License Originator status.

- 5%** Manage the security and safety of the branch, examining and monitoring related policies and procedures on an ongoing basis. Ensure that staff receives consistent security and robbery procedure training. Coordinate with Facilities to maintain branch fixtures, grounds, and equipment.

- 5%** Schedule adequate staff to ensure efficient branch operations. Monitor branch operations to ensure a consistent, professional approach.

- 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

Two to five years of similar or related experience, including time spent in preparatory positions.

Education

One or more of the following educational paths are required:

- Associates Degree
- Completion of a specialized certification or licensing at a business or trade school

Must obtain CCUFC Designation and Certified Lending Expert Designation within two years of hire date.

Skills

A 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.

EMPLOYEE SIGNATURE

DATE

AUTHORIZED REPRESENTATIVE

DATE