



## Client Service Representative

**Department:** San Jose Branch

**Reports To:** CSO/Supervisor

**Classification:** Non-Exempt (Hourly)

**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.



**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.