

# Branch Operations Specialist



Gulf Coast Business Bank  
Fort Myers, Florida

Send Resume to: [rruano@gcbbswfl.com](mailto:rruano@gcbbswfl.com)

## **Job description**

Manage client inquiries and complaints in a professional and efficient manner. Maintain client relations records and update client information, as needed. Reconcile and balance teller cash, vault, ATM, and TCR drawers. Primary contact for managing branch operations duties such as review reports, callback, certifications, etc. Answer client inquiries, make appropriate financial solutions and recommendations and assist with problem resolution. The Branch Operations Specialist may also provide support to the Deposit Operations Manager by completing back office operational tasks and other duties assigned, after coordination with the Branch Manager.

The candidate's success will depend on his or her ability to work independently, process information accurately and efficiently while delivering exceptional client experience. Maintaining a professional image in appearance and communication is expected. The Branch Operations Specialist is required to follow and uphold Bank security procedures and assure compliance with all Bank policies and procedures, as well as all applicable state and federal banking regulations. Assists in assurance of satisfactory internal and external audit and exam results.

## **Primary duties include but not limited to:**

- New account documents review and verification.
- Conduct data entry into company systems, and review and verify the information to ensure accuracy and accessibility.
- Reconcile teller cash, vault, ATM, and teller cash recycler drawers.
- Complete monthly cash counts and transaction reviews.
- Coordinate and conduct monthly branch audits with Branch Manager including management of branch and bank security protocols.
- Assist Branch Manager with annual security training.
- Assist with branch operations duties such as review reports, client callback, gathering account documentation, certifications, etc.
- Manage communications with clients regarding incoming and outgoing wire transfers.
- Perform client service functions such as check orders, change of address, return mail processing, supersede signature cards, and other account maintenance changes.
- Help manage internal client relationships by carrying out simple procedural tasks.
- Proactively support branch with new business or product promotions.
- Detect and report fraudulent or suspicious activities by completing BSA reporting as required.
- Maintain confidentiality of client information as well as Bank proprietary information.
- Ensure a positive experience for clients by having courteous interactions with them.

## **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Additionally, exercise good behavior in the workplace. Require the aptitude to maintain a positive work environment; sustain the attitude and ability to work with colleagues, clients, vendors, and management.

General knowledge and understanding of branch banking, bank operations, and other related banking and compliance functions.

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.

### **Technical Skills Needed**

Knowledge and experience with operating a computer, calculator, and other general office equipment. Experienced knowledge of Microsoft Suite is required. Very proficient in creating spreadsheets, producing reports, and tracking data.

### **Excellent social and communication skills**

- Comprehensive knowledge of related state and federal banking compliance regulations, Bank policies and procedures, the Bank's products and services, activities, and terminology.
- Excellent oral communication skills. Must be able to use professional and clear verbal communication skills. Use professional phone etiquette, including tone and volume of voice.
- Ability to communicate orally and visually.
- High quality writing skills, using accurate word usage, grammar, spelling, and punctuation in all written correspondence.
- Ability to maintain independence and/or autonomy.
- Team oriented individual with exceptional internal client service skills.

### **Mental Effort Needed**

Ability to multi-task, work in a fast paced, changing environment and maintain a commitment to accuracy and timeliness. Ability to follow policies, procedures, and written instructions, as well as verbal instructions or directions from his/her supervisor. Ability to get along well with colleagues and to work as part of Gulf Coast Business Bank's team, working towards the Bank's goals set forth by its' Board of Directors.

### **Physical Effort Needed**

The physical demands described here are representative of those that must be met by a colleague to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Regular, timely attendance during assigned work hours.
- Normal physical strength to manage routine office materials and tools. Normal dexterity of hands and fingers.
- Occasional lifting and transporting up to 20 lbs.
- Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

### **Desired Education, Training, and/or Experience**

- High school diploma or equivalent is required.
- Minimum of 5 years of previous experience in providing client support in the financial services industry, retail sales, service or banking related fields.
- 3+ years of experience as a Universal Banker or equivalent. A minimum of 12 months of new accounts or relevant banking experience is desired.
- Fraud detection and prevention experience is preferred
- Experience in Jack Henry products/programs, specifically Jack Henry Silverlake - Onboard Deposit and Silverlake Teller is preferred.

### **Job Type**

Part-Time

Day shift

Tuesday, Thursday, and Friday 8:30 to 2:00 pm

### **Work Location**

One location in Fort Myers, Florida