

# Sales Associate

**Date:** Aug 4, 2022

**Location:** Shepherdstown, WV, US, 25443

**Company:** United Bank

## Job Description

The Sales Associate is responsible for performing daily branch and customer service duties; providing customers with efficient and accurate transaction processing; promoting business by providing quality customer service and handling routine customer inquiries; providing customer referrals for products and services daily and have the ability and desire to interact in a team environment and be willing to contribute to the team efforts.

## RESPONSIBILITIES:

- Operate with accuracy and efficiency the appropriate core banking systems and a sales associate window as follows:
  - Accept deposits, verify cash deposits, endorsements and comply with Regulation CC requirements and bank deposit policies.
  - Accept payments for all loans/lines of credit.
  - Process the redemption of U.S. Savings Bonds.
  - Process night depository, ATM and mail deposits, if applicable.
  - Provide additional customer services including processing/issuance of official bank checks and credit card cash advances
- Balance assigned cash daily and maintains strict adherence to security procedures and sole control of cash drawer and assigned cash limits
- Adhere to cash differences/controllable losses policy
- Identify customers, by understanding and obtaining proper documentation of identification, obtains and/or verifies endorsements/payees, cash, and checks/withdrawals/transfers and obtains supervisor approval for authorization at bank-established cash limits, including the determination of the availability of sufficient funds, exclusion of stop payments and holds
- Verify signatures and account ownership as required. Exercises discretion, judgment, and initiative regarding transaction problems and inquiries
- Comply with all department and company policies, procedures and overall security.
- Prepare mandatory currency transaction reports and monetary instrument logs in compliance with Bank Secrecy Act regulations, including adhering to KYC, OFAC, and Information Security policies and procedures.
- Contribute to the responsibility in meeting monthly branch and/or individual scorecard goals on a consistent basis by monitoring self-performance and following action plans
- Ensure delivery of excellent customer service throughout the Bank by adhering to sales and @ your service standards.
- May be responsible for branch opening/closing procedures
- May escort customers to safe deposit boxes in accordance with the Bank's safe deposit box policy and security procedures
- May assist in opening/closing of branch vaults under dual control
- As needed, order, receive, verify, and distribute cash in accordance with bank policy
- Promote and maintain positive relationships with all internal and external customers
- Contribute to the fulfillment of the Bank's objectives and goals by performing as a team member in allocating and coordinating the workflow
- Responsible for keeping current and being knowledgeable in order to communicate the Bank's products and services to clients.

- As business needs arise, ability to open and/or close the Branch and may require working hours outside normal scheduled hours

## Qualifications

- High school diploma or equivalent.
- Successful completion of the Bank's in-house Sales Associate Training Program.
- Previous customer service contact experience is highly desired.
- Ability to demonstrate a sales oriented professional demeanor
- Excellent communication skills
- Experience in handling money preferred
- Proficiency in Microsoft Office Products (Word, Excel) required
- Understanding and working knowledge of appropriate core banking system is a plus
- Detailed oriented.
- Strong interpersonal skills.
- Professionalism and confidentiality are essential
- Ability to travel as business necessity arises to other branch locations to ensure proper staffing daily.
- Flexibility on work schedule as business needs arise

## KEY COMPETENCIES:

- Customer Service
- Interpersonal Skills
- Dependability (Attendance & Punctuality)
- Task Management

## ESSENTIAL FUNCTIONS:

- Sitting and standing for extended periods of time.
- Sufficient dexterity of hands and fingers to efficiently operate a computer keyboard, mouse and other computer components.
- Ability to converse and exchange information with all levels of staff within organization.
- Ability to observe, perceive, identify, and translate data
- Ability to travel via airplane, automobile, bus and/or train

## Company Profile

At United, we value all the relationships we have built since 1839. We are committed to providing each relationship with an unmatched level of service. While we offer competitive products, services, rates, and technology, the level of service we provide and our commitment to building relationships is what sets us apart from our competitors. Our 211 full-service banking offices and 15 loan origination offices in West Virginia, Maryland, Virginia, Ohio, Georgia, Pennsylvania, North Carolina, South Carolina and Washington, D.C. are each built on customer service and commitment to the community. United is backed by a history of safe, sound and secure banking practices that have allowed us to navigate through decades of changing economic environments. Because of this, our employees, customers, shareholders and communities can rely on us to be their banking partner for decades to come. Member FDIC. Equal Housing Lender. Equal Opportunity Employer.

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