PERSONAL BANKER II – FLOAT POSITION

Department: Retail Banking

Reports to: Branch Officer

Main Responsibilities: Travels regularly to assigned Charles River Bank branches based on daily and/or weekly scheduling needs. Quickly adjusts to different physical layouts and Branch Team dynamics. Continually expands knowledge and develops skills in order to assist others in each Branch with daily operations, procedures, and Customer engagements.

Summary: Processes Customer transactions and cash handling. Provides Customer service (in person, via phone, or online) such as addressing online and mobile banking inquiries, places check orders, assists with ATM/Debit Card issuing and PIN resets and conducts ATM balancing when requested. Performs all duties and responsibilities with respect to the PBII job function, recognizes opportunities to expand Customer relationships, and assists Customers with notary requests. Responsible for achieving established Customer engagement and service goals.

Judgment: Work is performed under the direct supervision of the Branch Officer, Assistant Manager, or Branch Supervisor/Head Teller following established routine and standard banking procedures. Requires some judgment and initiative in identifying Customer needs for Bank services and products. Refers all questionable situations to the Branch Supervisor/Head Teller or Branch Officer.

Supervisory Responsibilities:
N/A

Job Requirements:

- Must have reliable personal transportation, a valid driver's license and car insurance for regular travel between all Charles River Bank branches.
- High school diploma or equivalent, supplemented by on-the-job training; college degree is a plus.
- Candidate must successfully complete PBII assessment within 90 days from date of hire.
- Bank-related and computer courses. Above average computer and keyboard skills, proficient in Microsoft ™ Windows, Word, Excel and Outlook.
- Six months or more experience in the teller function, as well as sales experience, particularly in cross-marketing products and services.
- Excellent sales, interpersonal and communication skills.

- Good understanding of financial products and services.
- Ability to travel to all Charles River Bank Branch locations and assist with staffing and Customer requests based on daily and/or weekly scheduling needs.
- Strong time management skills, the ability to manage multiple workloads with successful results, and the ability to work independently.
- Organizational skills, excellent verbal and written communication skills, follow-up and listening skills are important for success in this role. This also includes problem analysis, problem resolution, above average interpersonal skills and strong computer skills.

Specific Job Functions:

- Processes banking transactions including deposits, check cashing, withdrawals, loan payments, etc.
- Provides a complete range of Customer service functions, including opening new personal accounts, explaining available financial institution products and services, and gathering Customer information to process new and existing accounts.
- Identifies Customer needs and actively refers loan, investment, insurance and wealth advisory solutions/services to appropriate financial institution specialists.
- Answers online inquiries and addresses online transaction inquiries/account opening requests.
- Daily use of online banking systems, debit card, credit card, check ordering, and other partner systems to provide high level of service to customers.
- Participates in activities for generating new business, including assisting with the business of the month table as well as special events.
- Completes arrangements and documents for special services such as exchanges of foreign currency and processing savings bond transactions.
- Assists Branch Officer with Customer outreach efforts.
- Proven sales ability, including knowledge of all affiliate bank products and services.
- Strong verbal and written communication skills and organizational skills.
- Participates in sales, service and product training meetings.
- Follows policies and procedures related to retail and lending.
- Ability to assist Customers with respect to Home Equity, MA Save and Consumer Loan products and submit consumer loan application/checklists to Consumer Lending.
- Represents the Bank at community events.
- Performs additional duties as assigned by Supervisor/Management.

Physical Requirements:

- Ability to communicate clearly and concisely with Customers and staff, lift and carry large bags of coins, and to stand for extended periods of time.

Salary Range:

- $22.00 - $30.00 per hour

Revised (November 2026)