

First Bank of Highland Park

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| Date | 2-12-2019 | Requisition Number | 2019 - 05 |
| Position | Banking Apprentice | | |
| Department | Teller Operations | | |
| Reports To | Teller Manager | | |
| Basic Function | Learn the basics of banking while training in teller operations and personal banking; and completing the two year Banking/Finance Apprenticeship program at Harper College. Position begins in August 2019. | | |
| Essential Duties | <p>HARPER COLLEGE</p> <ul style="list-style-type: none"> • Maintain academic and attendance requirements (Minimum 2.0 GPA) • Participate in academic progress reviews scheduled with mentors, faculty, and RA coaches • Must use Paid Time Off (PTO) for missed classes, such as sickness or vacation • Attend scheduled classes as required <p>1st Year: Teller</p> <ol style="list-style-type: none"> 1. Perform all the essential Teller duties <ul style="list-style-type: none"> • Receive checking and savings deposits: verify cash and endorsements, receive proper identification for cash back, and issue receipts of deposit • Process savings withdrawals and cash checks: verify endorsements, receive proper identification, and ensure validity • Issue personal money orders and cashier's checks • Process deposits from ATM and night deposit • Buy and sell currency from the vault as necessary to ensure cash limits are not exceeded • Accept loan payments: verify payment amount and issue receipts • Log and process mail • Prepare/change currency orders for business clients and roll coin • Accept county property tax payments • Close accounts per client request • Gather CTR information • Redeem savings bonds • File and maintain signature cards • Refer clients to other individuals and departments within the bank • Cross-sell bank products • Balance cash drawer 2. Perform additional Teller duties such as: <ul style="list-style-type: none"> • Prepare Collection Letters • Process: Cash Advances, Wire Transfers, Bond Coupons & Foreign Checks • Sell/Buy Foreign Currency • Wire Log • Foreign Drafts • Sending Savings Bonds to Fed for Redemption • Sell: Mastercard/Amex Gift Cards & Traveler's checks 3. Responsible for ATM/Debit Card duties such as: <ul style="list-style-type: none"> • Guide new clients through the entire card application process and perform any relevant troubleshooting for existing cardholders whenever necessary • Make adjustments as needed to client ATM/Debit card files: | | |

Website Job Posting

- Add/Remove accounts linked to cards
- Re-Order or Replace (lost/stolen) cards
- Handle requests for card limit increase and/or change of address
- Update and maintain appropriate ATM/Debit logs as needed:
 - Lost/Stolen Log
 - Compromised Card Log
 - Card Limit Increase Log
 - 30-Day Address Change Log
- Create new sets of ATM/Debit card numbers as needed using CardGen32
- Place miscellaneous addendas on accounts linked to cards for cardholders travelling internationally, as well as for closed accounts
- Ensure proper functionality of cards for clients who are travelling internationally through the adjustment of settings in EnFact and TranBlocker, within the CWSi module
- Maintain the accuracy of card file folders through regular file maintenance
- Process various daily, monthly, and periodic reports:
 - Closed Account Report
 - New Cards Issued Report
 - Card File Maintenance Report
 - EFT Case Status Report
 - Advance Reissue Control Report
 - Compromised Card Lists (as needed)

4. Perform departmental duties such as:

- Attend monthly meetings
- Order and arrange supplies
- Provide input for updating Teller, Collection and Client Services Manual

2nd Year: Personal Banker

1. Client Development

- Proactively deepens customer relationships by meeting their needs through additional products and services. Actively refers clients to other areas for additional needs. As well as successfully identify and develop prospects into new relationships
- Successfully onboards all new clients by cross-selling entire suite of products such as Online and Mobile Banking, etc.
- On a regular basis, follow up with clients and seek out new opportunities based on client's needs including recommending product solutions (including cross sales)
- Partners with other bank employees developing, communicating, and implementing the sales strategy in order to meet/exceed business objectives and exchanges leads/referrals. Conducts joint outside sales calls with employees at prospects or clients places of business
- Builds and maintains a robust external referral base (COI – Center of Influence) and Maintains a visible market presence)
- Regularly attend local networking events to promote the Bank and develop additional contacts.

2. Client Service and Maintenance

- Open new personal and business accounts
- Perform Maintenance on Accounts including but not limited to Name and Address changes, account renewals, signer and beneficiary updates, etc.

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| | <ul style="list-style-type: none"> • Counsel clients on their financial needs making recommendations where necessary and appropriate • Resolve client issues in a tactful and professional manner • Assist with clients Home Equity Applications • Review overdrafts and assist management in sound decisions • Assist in any other client services that may arise <p>3. Banking Product Knowledge:</p> <ul style="list-style-type: none"> • Have full knowledge of all retail banking products features and benefits included but not limited to demand deposits, savings, certificates of deposits, IRAs, Online and Mobile Banking, Home Equity Lines of Credit. • Understand the titling and structuring of various types of accounts. • Having a basic knowledge of other products the bank offers • Responsible for increasing knowledge for various product type to client base <p>4. Compliance/Risk:</p> <ul style="list-style-type: none"> • Adhere to compliance policies/procedures and internal controls • Assist with any compliance monitoring necessary • Support the Bank's efforts to ensure successful CRA results by participating in any Bank sponsored CRA activities when available • Address CIP due diligence exceptions related to account opening within 30 days <p>5. Perform Additional Duties such as:</p> <ul style="list-style-type: none"> • Support Retail Department in any capacity necessary • Support Manager and VP of Personal Banking with any special projects or reporting necessary <p>NONESSENTIAL DUTIES Other duties as assigned</p> |
| Knowledge, Skills & Abilities | <ul style="list-style-type: none"> ▪ Maintain friendliness and professionalism through the proper use of tact & diplomacy when dealing with clients at all times ▪ Display a positive attitude and enjoy working with the public ▪ Strong verbal and written communication skills ▪ Strong mathematical skills along with accuracy ▪ Strong level of accuracy and detail oriented ▪ Possess a great sense of organization, priority and time management ▪ Ability to identify, research and problem solve on a critical level and think on your feet ▪ Ability to be flexible and to multi-task on a regular basis ▪ Ability to work in a fast paced environment ▪ Strong knowledge of bank deposit products & regulations ▪ Capable of performing job duties at both bank locations (Highland Park & Northbrook) ▪ Current and remains up-to-date in relevant technology and systems |
| Training & Experience | <ul style="list-style-type: none"> • High School Diploma or GED • Previous leadership experience is a plus • Additional education and/or training helpful |
| <p><i>To Apply: Send email with attached resume to careers@firstbankhp.com. Please reference Job Code 2019 – 05.</i></p> | |