



Job Description

Job Title: Financial Center Manager

Job Code: 304/323 FLSA

Status: Exempt non-exempt Part-Time Full-Time X

EEO Job Category: 1

Reports to: Consumer Service and Deposit Operations Officer Job

Grade: 18

Revision Date: 2026

Supervisory Responsibility: Branch personnel (staff of 3-4)

Basic Function: Provide leadership, coaching and direction for the team consistently. Create an exciting environment for clients to visit and find solutions to all their financial needs and more. Be an awesome player coach and strive to live by our mission. Oversees the daily operation and financial functions of the Financial Center. Provide leadership with sales and client service coaching among the team.

Essential Duties & Tasks:

- Provide leadership in goal setting and attaining goals related to client sales and service. Consistently coach for outstanding performance while creating a great atmosphere for all.
- Exude a wonderful and “can do” attitude.
- Create a world class service environment.
- Create relationships for life with the team as well as with our clients.
- Utilize technology/social media to better serve our clients.
- Handle all aspects of the team management for the branch.
- Solicit and manage consumer lending relationships and opportunities, take loan applications and process through internal controls, compliance, and guidelines.
- Relationship building collecting information, analyzing needs, and making product recommendations, cross selling to other areas when appropriate.
- Calling on existing relationships to expand the relationship.
- Meet the service needs of the client and stay current with loan maturity.
- Develop and maintain relationships by being proactive in profiling customers and identifying needs and initiating customer contact.
- Solicit new business and referrals for all types of bank products offered, deposit, loans, cash management, wealth management, etc.
- Handles client problems and complaints, counselling customers with special needs or requests.

Essential Duties & Tasks: (continued)

- Be active within our community through participation in civic organizations, sponsoring community events and operating the branch in a friendly manner, and by developing and cultivating strategic relationships with business partners.
- Participates in activities for generating new business such as sales calls and special events.
- Consistently facilitate one on one and group meetings.
- Service existing relationships by addressing research and maintenance requests, decision overdrafts, followup on loan maturities and loan opportunities.
- Knowledgeable of policies and bank procedures.
- Make proactive calls to existing and prospective clients daily. Joint calls with Relationship Managers are encouraged.
- Make product/service recommendations, including pricing and product refinement suggestions.
- Use our CRM product to assist with creating relationships for life.
- Stay abreast of security policies and procedures and train staff.
- Proactive sales and services focused on treasury management. Includes but not limited to; remote deposit capture, merchant services, credit cards, automated clearing house, courier service, and CDARS. Exceed fee income targets for this area.
- Stay current with oral and written communications with customers and staff.
- Fostering the spirit of teamwork in supporting the bank's goals and Mission Statement.
- Ensure and coordinate the upkeep and maintenance of the facility.
- Ensuring compliance in BSA, OFCA, Privacy, Information Security, and all other regulations applicable to the position. Failure to ensure compliance can result in Civil and Criminal Penalties, as well as corrective actions up to and including termination.
- Additional duties as assigned.

Knowledge, Skills, and Abilities:

- Staying knowledgeable about the bank's products and services and looking for opportunities to make recommendations to customers based on need.
- Ability & knowledge to generate consumer loans & small business loans and take through closing process.
- Technology savvy.
- Dependability, Leadership, Managing People, making decisions and professionalism.
- Negotiation skills as well as excellent communication skills both oral and written.
- Knowledge of banking products and services, including loans, deposits, and compliance regulations.
- Selling, service and coaching skills required.
- Ability to open new accounts and cash management products.
- Experience in the use of Microsoft Applications and other computer applications.
- Display excellent written, verbal, and supervisory skills.

Education, Training & Experience

- Bachelor's degree and/or five or more years of related experience and/or training.
- Graduate School of Banking Programs or similar with two to three years banking programs preferred.
- Three years' management experience of personnel preferred.
- At least one year of lending experience in consumer and small business loans is preferred.

Physical & Mental Factors/Requirements:

- Must communicate effectively.
- Requires occasional bending, reaching, and stretching.
- Required to travel to other companies or customer locations.
- Must be able to stay focused in a variety of areas at the same time, multi-tasking.
- Must be capable of working under pressure as well as organizing and planning efficiently. Must have effective analytical skills for assessing and evaluating.
- May be required to sit for long periods of time while performing job duties. Receives and/or follows detailed instructions.
- Must be able to concentrate for extended periods of time, paying attention to detail.
- Must have a high level of interpersonal skills to communicate policies, procedures and objectives effectively throughout the bank and to represent the bank positively in the community.

Working Environment: Professional Office environment, and occasional travel to other branch locations.

EOE/M/F/Vet/Dis