

**PEOPLES BANK AND TRUST COMPANY  
JOB DESCRIPTION**

**JOB TITLE:** ASSISTANT HEAD PERSONAL BANKER  
**DATE:** OCTOBER 2024  
**DEPARTMENT:** PERSONAL BANKER/OPERATIONS  
**REPORTS TO:** HEAD PERSONAL BANKER  
**STATUS** Non Exempt/ Exempt

*To be considered for this position, please complete a PBT application.  
[www.pbtc.net](http://www.pbtc.net)*

**SKILLS REQUIRED:** Preferably two years related experience as a Personal Banker with above average performance required. Requires a sound knowledge of PBT's established procedures, methods, and policies especially BSA. Excellent communication skills, customer service skills and leadership/management skills required to address discipline issues with the Head Personal Banker and/or Branch Manager. Able to address and resolve difficult customer complaints. Must be computer literate and knowledgeable in Microsoft Excel, Microsoft Word, Core Director, and teller system. Requires ability to handle multiple projects and priorities in a fast-paced environment. Must be able to work independently with little or no supervision, be a proven team player and be able to adapt to change quickly.

**JOB SUMMARY:** Requires a sound knowledge of the Bank's established procedures, methods, and policies especially BSA. Works with Head Personal Banker to ensure policies/procedures are being followed by branch tellers. Requires ability to handle all duties as Assistant Head Personal Banker as well as additional duties described below. Expected to handle advanced work, transactions, and questions.

**PRIMARY DUTIES:**

1. Thorough knowledge of banking laws and regulations and PBT's policies and procedures especially BSA
2. Acts in the capacity of Head Personal Banker in their absence.
3. Proficient at and will perform daily Personal Banker duties.
4. Provide assistance and instruction to Personal Bankers as needed.
5. Assist in supervising branch Personal Bankers and day to day operations of the department. This includes but is not limited to setting work schedules and assigning specific job duties. Monitor workflow of Personal Bankers to ensure that customers are being handled in a timely manner and that the highest level of customer service is given to customers.

6. Assist in monitoring performance of branch Personal Bankers to ensure that all established bank policies and procedures are being followed. Assist Head Personal Banker in administering discipline when required to direct charges.
7. Assist other Head Personal Bankers/Personal Banker Manager/Supervisors if an issue involves branch.
8. Train or assist in training of new Personal Bankers in department and ensure ongoing training of department staff.
9. Monitor, research and resolve cash outages.
10. Assist in the weekly ordering of currency. Prepare, receive, and process cash shipments to and from the Federal Reserve and other PBT locations.
11. Assist in compiling reports required by management, including but not limited to:
  - a. Annual performance reviews
  - b. Balancing all cash totals (teller/coin/vault, etc.)
  - c. Maintaining a balanced vault and performing a physical vault balance twice weekly
  - d. Large Cash Transactions
  - e. Review CTRs, SARs, Holds
  - f. Other reports as needed
12. Participate in Head Personal Banker meetings, as needed.
13. Performs other tasks/duties as requested by Supervisor as they relate to the Bank and its functions.

**EDUCATION REQUIREMENTS:** Requires a high school education or equivalent work experience that demonstrates the ability to read, write, interpret, and apply instructions to perform the required activities. Should have strong mathematical aptitude and the ability to use a calculator, computer, applicable software programs and other office equipment.

**PHYSICAL REQUIREMENTS:** Must be able to stand for long periods of time. Be able to lift heavy coin bags/boxes or bundles of currency. Manual dexterity required.

*Peoples Bank & Trust Co. is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, or protected veteran status and will not be discriminate against on the basis of disability.*