

Advanz Federal Credit Union
Structured Compensation - Job Description
Branch Manager

Data Year: 2025

Prepared On: 05/20/2025

Department:	Member Service	Grade:	
Reports To:	VP of Member Service	Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	12/09/2019
		Revised Date:	09/08/2020

Role:

Assists in maintaining the quality of service provided by the Member Services Department; is capable of performing the duties of the Member Services personnel; is responsible for the day to day operation of all member services and documentation at the Branch; is responsible for branch personnel performance; assists in the development and maintenance of member services programs.

Essential Functions & Responsibilities:

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|---|-----|--|
| N | 25% | Is knowledgeable of deposits, withdrawals and balancing of a cash drawer. |
| N | 17% | Is knowledgeable of and can perform all member services duties. |
| N | 12% | Is knowledgeable of credit union policy and enforce the same. |
| N | 10% | Is knowledgeable of proper computer input. |
| N | 10% | Is skilled in managerial skills including training subordinates. |
| N | 9% | Is knowledgeable of cross selling of services and performs the same. |
| N | 7% | Is responsible for physical location of the branch and report and assist with any upkeep required. |
| N | 5% | Responsible for opening and closing branch daily. |
| N | 5% | Responsible for making sure that branch has adequate staffing daily including during lunch times. |

Performance Measurements:

1. Receives members in person or by telephone; determines the nature of the member's business and either transacts the member's request or refers him/her to the suitable staff person.
Provides, in person or by telephone, routine information concerning Credit Union services or policies, including: what is a credit union; eligibility for membership; how to apply for membership; type of accounts available; insurance coverage for shares and loans; basic loan policies; interest rates charged on loans; how dividends are computed on shares; how to start, change, or stop a payroll deduction; the locations, office hours, and telephone service.
2. Maintains the confidential nature of all member transactions, information, and other related operational data as required.
3. Attends meetings, educational and training sessions, as required, and maintains credit union equipment in proper working order.
4. Assists in the proper orientation and training of new branch employees; instructs staff of procedure changes that would improve efficiency of accounting.
5. Oversees, guides and assists subordinate branch personnel in their efforts to maintain smooth and effective retail operations.
- 6.

7. Answers questions for subordinate personnel, and if necessary, requests answers from the Vice President of Member Services.
 8. Performs clerical duties as required to process member accounts and transactions.
 9. Has a thorough knowledge of Credit Union policies and procedures as to the proper maintenance of member accounts and as to the proper opening, documentation, processing and maintenance of share services. Also, orders instant issue cards as requested and inventories card stock.
 10. Maintains accurate records as may be required to support the activities of the member services department.
 11. Is capable of, and as the situation may warrant, will perform the duties of Member Services Representatives.
 12. Reviews such daily reports to maintain strong internal controls, including but not limited to, the savings deposits and withdrawals, vault balances, Reg CC, and Reg D, and such reports required for savings/demand account reporting.
 13. Responsible for assuring that each savings transaction performed is properly prepared, documented, and approved/denied; if approved, promptly and properly set up; and if not approved, proper notification and documentation.
 14. Responsible for assuring that adequate cash is available at all times for the branch office; for balancing of the branch vault cash; and that reports are properly prepared, acted on, and filed.
 15. Assists the President/CEO and the Sr. Vice President as the situation may warrant. Also, assists Lending Department.
 16. Daily opens and closes computer terminal accounts for assigned transactions and balances to the terminal close report. Remits receipts to the New Account Manager
 17. Performs such other duties as may be assigned by his/her supervisor, which are commensurate with his/her position and in the best interest of credit union operations.
 18. Opens/closes the branch in accordance with the schedule.
 19. Follow the Bank Secrecy Act Policy and Procedures.
- Branch specific duties:
- Highview – Scan and archive loan documents, Indirect Loans, prepare loan minutes, quote payoffs, update HELOCs, and back up loan processor.
 - Indiana – L5 updates, release auto & mortgage liens, quote payoffs, and back up loan processor.
 - PRP – Online verification of social security deposits, new loan courtesy calls, new account courtesy calls, calls to negative checking accounts, and club account excessive withdrawal fees.

Knowledge and Skills:

Experience	Three (3) years' work experience, preferably in a financial institution.
Education	A high school education or GED.
Interpersonal Skills	Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.
Other Skills	The person holding this position is required to have complete knowledge of Credit Union policies and procedures; thorough knowledge of collection procedures; the ability to accurately balance credit union transactions; to organize work; mental alertness; neatness in appearance;

punctuality; dependability; and a cooperative attitude in relations with members, other employees, and vendors.

Physical
Requirements

Work
Environment

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature