

***Lebanon Federal Credit Union***  
***Branch Manager***  
***Job Description***

**I. Position Reports To: Operations Manager**

**II. Basic Functions:**

Guide and manage branch office in providing quality service to new and existing members in loan applications, account transactions, and new accounts. Lead staff by exemplifying Core Values. Solve problems within established policies and guidelines.

**III. Essential Functions:**

- Primary responsibility is to handle Home Equity and Mortgage lending for the office.
- Maintain a highly motivated, well-trained staff, maintaining effective employee relations.
- Apply and evaluate policies and procedures set for the branch. Ensure that the branch is in compliance with credit union regulations and procedures, and federal and state laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.
- Evaluate the job performance of branch office staff to ensure quality of work and service to members. Schedule and cross-train adequately to ensure effective branch succession and efficient branch operation.
- Create and maintain a cross-selling environment within the branch. Train employees to maximize opportunities to sell products.
- Adheres to all policy and procedures set-forth by the Credit Union.
- Maintains communication between the branch and management by preparing reports to monitor branch activity, including number of transactions, volume, teller errors, loan volume, product sales, new accounts and other activity as requested.
- Hold monthly staff meetings to discuss areas needing improvement, changes in procedures, new developments or services and to present general information.
- Keep Branch Operations Manager informed of department's activities, needs and problems.
- Ensure that all information and transactions regarding credit union members are kept confidential.
- Ensures that proper controls are exercised over the vault, ordering and counting money for the branch and verifying daily vault settlement.
- Conducts daily/weekly audits of ATM, Vault Cash and Cash Dispensers. Assists Assistant Branch Manager and Head Teller in quarterly surprise audits of all teller drawers and reviews all bait money quarterly.

- Manage the security and safety of the branch. Analyze and monitor security and safety policies and procedures on an on-going basis. Ensure that staff receives on-going training on security and robbery procedures.
- Monitor branch operations and appearance to ensure a consistent, professional approach. Appearance and operations include but are not limited to policies such as Dress Code and Branch Facilities as well as actions expected per our Core Values.
- Conduct Consumer and Mortgage loan interviews. Process and approve loans in accordance to the credit unions underwriting standards. Ability to disburse loan closing as needed.
- Represent the Credit Union in community events and participate in branch networking opportunities.
- Assist staff or members in solving complex account problems.
- Performs other various duties as assigned by Operations Manager.

#### **IV. Qualifications:**

- Bachelor's degree in Business Management or 3-5 years experience in a financial institution.
- Must possess leadership and supervisory skills.
- Must possess strong problem solving skills.
- Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures or governmental regulations. Ability to write reports, business correspondence and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, members and the general public.
- Ability to prioritize and manage multifunctional tasks.

#### **V. Disclaimer:**

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as an exhaustive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.