



Will Train Applicant(s)

Job Title:	Lead Teller	Job Type:	Salary
Location:	Hamilton		
Level/Salary Range:		Position Type:	Full Time
HR Contact:	Manager/Board		
External Posting URL:	N/A		
Internal Posting URL:	N/A		
NAME:			
Job Description			
<p>ROLE AND RESPONSIBILITIES</p> <ul style="list-style-type: none"> • Daily open credit union at 7 am, open and balance vault, balance morning reports before any business is conducted. • Sell money to Tellers for drawer daily • Order money for Vault when needed • Daily verify the Corporate One account and balance (morning). Wire money from Corporate One as needed. • Manage the Super 30 Corporate Investment (monthly). Manage CD investments for Credit Union. Manage CD investments for the CU and prepare monthly Investment report for Board. • Customer Portal – update and manage customer online access (reset passwords, etc.) • Customer service to members for inquiry to accounts (problems, understanding, adjustments, etc.) • Calculate and Post dividends to customer accounts quarterly • Prepare and submit Audit inquiry information to auditors timely and accurately. (NCUA, Supervisory, BSA, ACH, etc.) • Review policy and procedure and maintain current updates, obtain board approval and review with all personnel required. • Train Tellers in the position and any new responsibilities • Serve as back up to Loan Officer <p>Serve as backup to Teller duties below:</p> <ul style="list-style-type: none"> • Courteously provide AMPOT members/customers with services to access their accounts • Accept, distribute, and properly post deposits, withdrawals, payments, check cashing, and other transactions to members/customers' accounts. Process any transactions that may be received via mail or delivery service. • Process CTR (Currency Transaction Report for any deposit >\$10k) • Answer phone and assist members/customers, or direct to proper personnel. Review email daily and process any business resulting from emails. • Open new accounts 			

Job Description Lead Teller cont.

- Set up checking accounts, order checks, set up and order debit cards, set up CD's (certificate of deposit), assign safety deposit boxes
- Assist members/customers with issues regarding accounts, debit cards
- Debit Card Review for fraud inquiry, activation of card, and debit card hold (LSC – League Service Corp)
- Daily pick up and deliver mail
- Run MLA (Military Lending Act Report) on all new loans and file with loan documents
- Check loan files for document completion
- Night Deposits – record receipts or post transactions (must have two people to complete due to segregation of duties)
- Order Supplies for Credit Union (office, kitchen, bathroom, maintenance, etc.)
- File as needed, clean out and purge files as often as required.
- Daily balance of money drawer
- Work window and drive through
- NADA – lookup vehicle values for loan and borrowing base
- Dormant Account Review – contact account holder via phone or letter. Determine account status and update

QUALIFICATIONS AND EDUCATION REQUIREMENTS

High School Diploma required. Some college preferred. Basic math skills

PREFERRED SKILLS

Microsoft Suite including Excel, Word, PowerPoint. Operate computer, calculator, copier, fax, etc.

ADDITIONAL NOTES

CERTIFICATIONS OR SPECIAL TRAINING IN BANKING OR FINANCE A PLUS.

Reviewed By:	Name	Date:	Date
Approved By:	Name	Date:	Date
Last Updated By:	Name	Date/Time:	Date/Time