

<b>Job Title:</b>	Hy-Vee Personal Banker	<b>FLSA:</b>	Exempt
<b>Division:</b>	Banking	<b>Revision Date:</b>	02/01/2021

**Position Purpose:**

This position is responsible for managing all aspects of a Hy-Vee employee's relationship with Midwest Heritage banking, investment and insurance products. Responsibilities include developing, and maintaining strong relationships with Hy-Vee Employees and internal partners in an effort to help new and existing Hy-Vee employees find product solutions that meet their needs and budgets.

**Essential Functions:**

**Business Development:**

- Visit Hy-Vee and subsidiary locations within a designated territory on a consistent rotating schedule to grow Midwest Heritage awareness and become the go to financial wellness expert.
- Responsible for originating consumer loans and opening new deposit accounts.
- Actively refer qualified Hy-Vee auto insurance, home insurance, life and health insurance leads to Midwest Heritage in house experts.
- Utilize Salesforce CRM to identify potential employee prospects and maximize overall efficiency.
- Develops key Hy-Vee relationships through active participation in store meetings, employee interactions and local community activities.
- Provides business information and strategic advice to new and existing Hy-Vee employees by identifying needs and making appropriate suggestions for available services while promoting exclusive advantages of working with Midwest Heritage.
- Ability to meet monthly activity, production and business goals established by all Midwest Heritage divisions.

**Customer Service, Marketing & Communication:**

- Provides friendly, efficient, and accurate assistance to Hy-Vee/Subsidiary employees.
- Provides each store with marketing materials and coordinates other marketing opportunities in Hy-Vee stores.
- Organize and present educational sessions for Hy-Vee employees.

**Administrative & Miscellaneous:**

- Document and update salesforce.com on a consistent basis.
- Stay current on applicable industry updates and legislation changes.

**Secondary Duties and Responsibilities:**

- Actively participates in regional and company training programs and sales calls, seminars, and other meetings.
- Performs other job-related duties and special projects as required.

**Education, Experience, and Other Requirements:**

- Must be bilingual (Spanish)
- Bachelor's degree in finance, insurance, business, marketing, or related field. Will consider combination of education/experience in a related role in lieu of education.
- Two or more years of experience in banking, financial services, sales or related field.
- Valid driver's license and reliable transportation.
- Must have an active Nationwide Multistate Licensing System (NMLS) number. NMLS number must be in good standing, maintained and all requirements adhered too. For employees new to the position the NMLS number must be obtained within 60 days.
- Must have residency in or near their assigned territory of Hy-Vee/Subsidiary locations and have the ability to travel up to 75% in the territory with up to 10% overnight for training and other business purposes.

**Reporting Relations:** VP Retail Sales

Supervisor Responsibilities: None

**Working Conditions and Physical Requirements:**

- This is a fast paced work environment normally conducted in a private location, Hy-Vee, or subsidiary retail location.
- Some duties may be completed at employee's residence as there is not a physical office provided.
- There is frequent pressure to meet deadlines and handle multiple projects at once.
- Travel within designated area, and as needed for other training and business purposes.
- Employee will be using personal vehicle.

**Travel:**

Minimum of 75%

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This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Midwest Heritage is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age or veteran status.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

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**Employee Name (please print)**

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**Signature of Employee**

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**Date**