MIDWEST HERITAGE
A Hy-Vee Company
Banking • Investments • Insurance

Job Title:	Retail Sales Associate I (Teller)	**FLSA:**	Non-Exempt
Division:	Banking	**Revision Date:**	03/29/2022

Position Purpose:
The Sales Associate I is responsible for teller and personal banking functions. This position is responsible for promoting all Midwest Heritage products and services to customers and provides competent and courteous service to existing and prospective customers.

- Retail locations are open seven days a week and extended hours on weekdays. Incumbent must have the flexibility to work non-traditional banking hours, including some weekend and evening hours.
- Chariton location is open six days a week. Incumbent must have the flexibility to work Saturdays.

Essential Functions:
Sales:

- Responsible for completing in-aisle walks and PA announcements as required. (Retail Locations)
- Increase account relationships of existing bank customers and attract new customers by introducing them to new products and services.
- Successfully achieves all sales goals on a continuous basis.

Operations:

- Processes all types of teller transactions as well as maintains and balances a cash drawer daily.
- Maintains knowledge, skills, and abilities in regard to Midwest Heritage products and services by participating in on-going training and staying aware of internal communications.
- Assists the Operations Supervisor in clerical support including filing, ordering supplies, maintain office records, and preparation of reports.
- Successfully achieves all operations goals on a continuous basis.

Customer Service:

- Ensures that customers are satisfied with the products and services that they obtain.
- Proactively and professionally communicates with customers regarding their financial needs.

Secondary Duties and Responsibilities:
Performs other job-related duties and special projects as required.

Knowledge, Skills, Abilities Required:

- Professional presentation and excellent communication skills.
- Strong attention to detail.
- Strong computer and keyboarding skills.
- Ability to report to work when scheduled and on time.
- Retail locations must have availability to work days, evenings until 7:30pm, and weekends.

Education, Experience, and Other Requirements:

- Must be 16 years of age.
- Successful experience in a customer service capacity.
- Previous sales or cash management experience preferred.
- Previous Bank Teller experience is preferred.
- Previous experience must demonstrate the ability to sell, communicate effectively, and provide excellent customer service.

Reporting Relations:

Accountable and Reports to: Operations Supervisor
Supervisor Responsibilities: None

Working Conditions and Physical Requirements:

- Primarily 100% inside with occasional local travel.
- This position is classified sedentary/light and requires the ability to sit for long periods and/or stand for long periods of time.
- Frequently communicates with customers in person and on the phone. Must be able to exchange accurate information.
- Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine, and computer printer.
- Close visual acuity to perform an activity such as: preparing and analyzing data and figures, transcribing, viewing a computer terminal, reading.
- Retail locations - Hours vary from week to week including days, evenings until close (7-7:30pm), and some weekend hours.

Travel:

Minimal

Equipment Used:

Computer printouts, incoming mail, calculator, computer terminal, copy machine, fax machine, various software programs.

Other Position Requirements:

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.

- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

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.

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)

_____ _____

Signature of Employee **Date**