



AVP, Client Services Branch Manager

Beverly Hills, CA Branch Office

Understanding that exceptional people... create exceptional circumstances!

Who we are: We are a bank that knows our clients by name, understands their banking needs and works as a team to provide the highest level of service possible. We provide modern banking tools strengthened by a renowned tradition of service. We offer our clients choice and flexibility in managing their finances, while preserving the personal touch and accessibility they expect.

What to expect: Driven by shared values of team spirit, commitment, responsibility, and innovation, all our teams are focused on delivering a truly personal service. All team members, regardless of their role, help create better deeper, more personal relationships with our clients, while offering them a greater level of service and opportunity. As a subject matter expert, you will have access to all decision makers. Everyone in the bank is focused on creating the best possible client experience imaginable.

Here's what you'll do: The **AVP, Client Services Branch Manager** is responsible for the oversight of staff performing routine branch duties; account opening of retail and commercial checking and savings deposits, processing of loan payments, cashes checks, savings withdrawals, and other client transactions as requested at our **Beverly Hills, CA branch office**. Promotes business by maintaining quality customer relations and referring customers to appropriate staff for new services. Supervises the workflow, ensuring and providing branch department support as it relates to the daily operations of the branch.

DUTIES AND RESPONSIBILITIES:

- Provides day to day supervision, on the job training, assigns tasks, and assists in problem resolution.
- Responds independently to the most complex issues and or conducts research to determine solutions for client transactions as requested, ensuring that all necessary documents are properly authorized, in proper form, within authorized limits, and completed accurately.
- Receives retail and commercial checking and savings deposits and issues receipts.
- Cashes checks and savings withdrawals.
- Assists customers with cashier's checks and tax payments.
- Reviews account activity, determines balances, and resolves problems within given authority.
- Receives and processes incoming and outgoing wire transfers.
- Receives and processes stop payment and holds.
- May accept loan and installment payments.
- Maintains accurate teller balancing records and balances teller differences as required.
- Cross-sells the Bank's other products and services, referring customers to appropriate staff as indicated.
- Processes ATM deposits, verifications of deposit, certifications, change orders and deposit slip corrections.
- Opens, closes, and completes callback and maintenance of new accounts as needed.
- Adheres to quality control standards and programs to ensure audit control, compliance with applicable governmental and banking regulations, loss prevention and compliance with safety regulations.
- Take steps necessary to maintain all department files and records in current and complete order.
- Performs other related duties as assigned by management.

**What you Need to Succeed:**

- High school diploma or associate degree (AA) or equivalent combination of education and experience preferred.
- 5 years' branch operations or central operations experience in a banking environment.
- Recent knowledge of Beneficial Ownership and Risk Rating processes.
- Strong working knowledge of BSA.
- 5 years supervisory or lead experience.
- Experience with personal and business new accounts opening process and documentation.
- Intermediate knowledge of bank operations, bank products, and banking regulations.
- Core banking system experience such as DCI iCore360 preferred.
- Proficient computer skills including Microsoft Teams 365, Outlook, excel, and Word.
- Strong verbal and written communication skills.
- Ability to multi-task.
- Ability to work with general to minimal supervision while performing tasks and assigned duties.
- Ability to interact with all levels of management and team members.

What's in it for You:

Excel Bank offers competitive compensation and incentive packages, along with a comprehensive benefits package that includes:

- *Competitive salary.*
- *Excellent comprehensive benefits package includes medical HMO or PPO, dental, and vision.*
- *Bank paid life insurance and long-term disability.*
- *Matching 401(K).*
- *Vacation and Sick Benefits.*
- *Paid Bank Observed Holidays.*

We offer a highly desirable work environment with committed banking professionals who value teamwork and collaboration.

INCLUSION AND EQUAL OPPORTUNITY EMPLOYMENT

Excel Bank is an equal opportunity employer committed to diversity and inclusion. All qualified applicants for employment at Excel Bank will receive consideration for employment without regard to race, religion, color, sex, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, age, protected medical condition, disability, or any other protected status in accordance with all applicable federal, state, and local laws.

To apply, please send cover letter and resume to: careers@excel.bank