



## Senior Universal Banker

Full-Time, 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 **Senior Universal Banker** is responsible for providing new account services, customer assistance and variety of regular and recurring operational functions at our **Beverly Hills, CA branch office**. The Senior Universal Banker will sell or refer retail consumer and business products and services to prospective and existing clients and develop and maintain internal partner relationships to maximize cross-sell. Promotes business for the Bank by maintaining quality customer relations and referring customers to appropriate staff for new services. With your exceptional experience and knowledge, you will be the lead for other Universal Bankers.

- Open new accounts for consumers and business by ensuring proper documentation and identification; maintain existing accounts of all types and closes account as needed.
- Processes Beneficial Ownership and Risk Rating forms.
- Provides quality customer services including servicing existing customers, answering inquiries, recommending solutions to customer problems, and ordering checks.
- Maintains customer files in order and scans to core system.
- Assist with other operational tasks as assigned, including the development of reports and procedures and client training.
- Identifies opportunities to cross-sell bank products and services and generate referrals.
- Reviews and verifies daily reports.
- Familiar with all bank products and services.
- Reports suspicious activities to manager, Chief Risk Officer or BSA Officer.
- Provides back-up to Client Services Department.
- Secondary back-up to Central Operations such as Wires, Return Items, Overdraft, Non-Post, Stop Payment, GL Reconciliations.
- Support Cash Management as needed.
- Provide the highest level of customer service possible to all Excel Bank's employees, participant lenders, and to borrowers.

### **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.
- 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, and Word.
- Strong understanding of Excel.
- Strong verbal and written communication skills.
- Ability to multi-task.
- Ability to understand and follow instructions and guidelines.
- 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](mailto:careers@excel.bank)