

## OFFICE MANAGER

<b>Department:</b>	Retail
<b>FLSA Classification:</b>	Exempt
<b>Revision Date:</b>	January 2026

The purpose of this job is to oversee all functions relating to the establishment and maintenance of all deposit accounts; perform scheduled audits of deposit services area; oversee deposit services equipment, including teller terminals, ATM machines, safe, safe deposit boxes, night deposit, etc. Also assists Sales Manager in the annual review of Teller(s), and Personal Banker(s).

### Essential Functions

To accomplish this job successfully, an individual must be able to perform, with or without reasonable accommodation, each essential function satisfactorily. Reasonable accommodations can be made to help enable qualified individuals with disabilities to perform the essential functions.

- The primary responsibility of this role is deposit growth and customer service regarding deposit relationships. Schedules and assigns work to all non-lending positions within the branch.
- Oversee all functions relating to the establishment and maintenance of all deposit accounts (checking, savings, IRA, etc.) including customer service and support.
- Perform the retail office self-audit checklist on a quarterly basis and maintain all audit records in the retail office self-audit manual as required.
- Solicit depository relationships & cross-sell bank's products and services and the training of Universal Banker's and Tellers in the cross-selling of these.
- Responsible for ensuring:
  - Bank is opened promptly and CSR's and Tellers are at their workstations, ready, when the branch opens.
  - All in-coming phone calls are handled professionally and promptly.
  - Deposit relationship customers receive attentive, friendly, & professional service from the time they enter office to the time they leave.
- Oversee all teller functions including deposits, withdrawals, the selling of official checks (cashiers checks, money orders, travelers' checks, etc.) daily balancing and cash control as needed.
- Oversee all ATM transactions, maintenance, daily balancing and reporting.
- Oversee safe deposit box rentals, maintenance and reporting.
- Maintain all deposit related forms and brochures.
- Maintain office security procedures, alarm systems and cameras.
- Accept and send notices of levy to Deposit Operations.
- Administer the assignment of all keys issued to bank employees and log.
- Retrieve Overdraft Report and make pay or return decisions.
- Coordinates the training and development and where necessary conducts "on the job" training for employees.
- Responsible for developing and maintaining customer and business relations within the branch's market area.
- Ensures all Bank brochures are up to date, stocked, and visibly displayed for customer convenience.
- Assists the universal bankers during peak periods; Provides backup for tellers when needed.

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- Keeps staff informed of pertinent changes in operational policy and procedures.
- Ensures bank is in compliance with federal banking regulations including, but not limited to Bank Secrecy Act, OFAC, Community Reinvestment Act, American with Disabilities Act, Right to Financial Privacy Act, Gramm Leach-Bliley Act, the Federal Reserve's "lettered" regulations, and Branch Manager roles and responsibilities relating to each act.
- Ensures excellent customer service skills are practiced by all the staff.
- Represent BankTennessee professionally, efficiently, and tactfully.
- Acknowledge and greet customers with a smile, call customers by their name, ask if they need any additional assistance, thank customer at end of every conversation.
- Ensure continuing development of professional relationships with management and colleagues.
- Receive incoming bank visitors and assist in directing them appropriately.
- Aid other departments as necessary.
- Participate in Civic/Community Activities as necessary.

**Competencies**

- Strong dedication and motivation to achieving sales, service, operational results, and exceeding expectations.
- Ability to effectively follow and carry out Bank customer service and sales standard processes and achieve necessary goals.
- Strong attention to detail, with a proven track record of accuracy and efficiency in handling customer transactions.
- Excellent communication skills, both verbal and written.
- Ability to maintain strict confidentiality and handle sensitive financial information.
- Proven time management and organizational skills; able to effectively handle multiple priorities and adapt effectively as pace and business needs fluctuate.
- Ability to effectively and efficiently learn Bank software.
- Strong working knowledge of Microsoft Word and Excel.

**Physical Demands**

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is frequently required to stand or sit; kneel, stoop, or squat; use hands or fingers to handle or feel objects, tools or controls; reach with hands and arms; and talk or hear. The employee is occasionally required to walk. The employee must occasionally lift and /or move up to 25 pounds. Specific vision abilities required by this job include close vision, peripheral vision, depth perception and the ability to focus.

**Work Environment**

The Bank's professional working environment requires employees to communicate effectively, both verbally and in writing. Employees must demonstrate strong interpersonal skills when working closely with

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internal business partners and external clients. Employees may be exposed to confidential and propriety information within the working environment, therefore, must uphold confidentiality at all times. Due to the possibility of being exposed to high risk situations (i.e. robbery), detailed instructions and procedures are required to be followed at all times to safeguard the Bank's employees, customers, and assets.

**Travel**

- Occasional travel to other BankTennessee facilities.
- Occasional travel to non-Bank facilities for professional development opportunities, community engagement activities and other events.

**Required Education and Experience**

- High school diploma or equivalent required. College education preferred.
- Minimum of 3 years experience in banking or related field; 5 years preferred.

This job description is a general description of the types of responsibilities that are required of an individual in this job. It is not intended to cover or contain a comprehensive listing of all duties, responsibilities or activities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

*BankTennessee is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, ancestry, national origin, sex, sexual orientation, religion, age, disability, genetic information, veteran status, or any other characteristic protected by State or Federal law.*