

Position Title: Customer Service Representative 2
FLSA Status: Non-Exempt
Reports To: Branch Manager
Location: Spencer
Date Created: January 2026



Position Summary:

The Customer Service Representative (CSR) will complete deposits, withdrawals, and other financial interactions while providing excellent customer service to all customers.

Essential Job Functions

- Cash checks and disburse funds after verifying signatures and sufficiency of funds to support withdrawals.
- Accept deposits, confirming accuracy of the transaction.
- Prepare, verify, and issue cashiers checks, bank and personal money orders, travelers checks, E bonds, and correspondent drafts.
- Enter transactions in banks recordkeeping system, recording all transactions and producing customer receipts.
- Evaluate checks to verify endorsements, dates, identification of persons receiving payments, bank names, and overall legality of the documents.
- Identify and capitalize on opportunities to promote new banking services.
- Calculate daily transactions using appropriate technology.
- Balance all monies in cash drawers at the end of shifts.
- Accept and count inventories of cash, drafts, and travelers checks each day.
- Maintain a work area that ensures the safety of all negotiables and confidential records.
- Prepare monies for deposit or shipment to branch banks or the Federal Reserve Bank.
- Order a cash supply to meet daily needs.
- Answer and direct incoming calls to the appropriate employee, take messages where appropriate.
- Process ATM deposits, replenish and balance the ATM weekly.
- Open and maintain all checking, savings, and certificate of deposit accounts – including all due diligence on new customers and completing logs.
- Proactively promote the bank and its products and services.
- Perform other duties as assigned.

Skills and Experience

- Excellent verbal communication skills.
- Excellent math skills.
- Trustworthiness and ability to act with integrity.
- Thorough understanding of customer service.
- High School Diploma or equivalent is required.
- Previous experience working directly with the public is preferred.

Physical Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to stand, walk, use hands to handle or feel, reach with hands or arms, talk or hear. The employee must regularly lift and/or move up to 15 pounds. The employee must be able to lift and/or move up to 25 pounds occasionally.

Working Environment

While performing the duties of this job, the employee will be exposed to indoor conditions. The noise level in the work environment is usually moderate.

Employee Acknowledgment

I acknowledge that I have received, read, and understand the duties and expectations for the job listed above. I agree to perform the duties outlined and to comply with all standards established in the performance of this job.

Employee Signature: _____

Date: _____

Employer Signature: _____

Date: _____