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Universal Banker

US-IL-Aurora

Category Retail - Personal Banking **Type** Regular Full-Time

Responsibilities

This is a non-exempt/hourly position. Non-exempt employees categorized as Full-time generally work 37.5 hours per week.

Summary: Universal Bankers perform both Teller and Platform transactions according to established bank procedures. They acquire knowledge of bank products and are able to open and service accounts and identify cross selling opportunities to both new and/or existing customers.

Essential Functions of the Universal Banker:

Reasonable accommodations may be made to enable individuals with disabilities to perform the following essential functions.

- Consistently provides exceptional customer service. Engages customers in the lobby and takes ownership of customer experience, fulfilling general customer transactions on the teller and platform systems.
- Develops and expands customer relationships by proactively identifying customer needs and offering advice and appropriate financial solutions to help customers achieve their financial goals. Refers more advanced customer product needs to senior staff as needed.
- Under the guidance of a mentor, works to learn moderately complex consumer and business products/services, consumer loans and credit cards, business accounts, IRA's, and/or fiduciary accounts.
- Maintains operational signing and approval, and wire transfer authority.
- Assists with educating customers on options for managing financial transactions by leveraging technology, tools and resources. Promotes the use of WSB technology to our customers for their use in their daily banking.
- Maintains working knowledge of bank deposit, loan products and services and identifies opportunities to refer existing customers and prospects to Wealth Management, Cash Management and other internal business units.
- Initiates and ensures successful onboarding of customers to WSB through the use of phone calls, E-mail, and mailings.
- Resolves a variety of customer problems while ensuring the highest level of customer experience and satisfaction. Escalates customer concerns as necessary. Uses available resources for problem resolution, which may involve analysis of information received from other internal departments. Knowledgeable of and able to navigate through deposit and teller automation applications. Provides customer guidance and navigation through various delivery channels.
- All other reasonable duties as assigned.

Qualifications

Qualifications of the Universal Banker/Required Education and Experience:

- Strong computer skills. Proficiency in Microsoft Office Suite;
- Excellent verbal and written communication skills;
- Strong customer service and problem-solving skills;
- 1-2 years banking experience, or equivalent experience in a customer contact/sales position.
- Demonstrated ability to meet and/or exceed the standards of both the teller and platform functions on the position.
- High school diploma or equivalent.

Preferred Experience:

- Bilingual in English/Spanish preferred

Requirements for performing the Essential Functions of a Universal Banker:

On the job the employee may physically be required to bend, sit, stand, walk, use finger movements, and/or handle objects (manual dexterity). On the job the employee must mentally be able to read/comprehend, write, perform calculations, communicate orally, reason, and analyze.

Equal Opportunity Employer/Veterans/Disabled

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, or protected veteran status and will not be discriminated against on the basis of disability.