



## JOB DESCRIPTION

---

**JOB TITLE:** Customer Service Representative  
**DEPARTMENT:** Retail Banking  
**REPORTS TO:** Retail Banking Supervisor  
**FLSA STATUS:** Non-Exempt  
**ASSIGNMENT CATEGORY:** Part Time, Regular  
**OFFICE LOCATION(S):** Lena, Freeport, Stockton, Elizabeth, Savanna  
**ISSUE DATE:** March 2025

---

### PURPOSE AND PERFORMANCE GOALS

Responsible for processing new/existing account transactions; assisting customers in their selection of various accounts and financial products and services; cross-selling the Bank's products and services; performing branch clerical duties (as needed); and promoting business for the Bank by maintaining good customer relations and referring customers to appropriate staff.

Considered a relationship manager with a focus on sales development and relationship building, through the promotion of deposits, loans, fee-based services and the retention of customers. Responsible for selling a full range of banking products and services to existing and prospective customers while providing specialized customer care.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

Provides a complete range of customer services, including answering phones, opening new accounts, and explaining available financial institution products and services.

Receives checks and cash for deposits to accounts, verifies amounts, and examines checks for proper endorsement. Assists in the bank-by-mail function and night deposit envelopes. Issues money orders and cashier checks. Balances cash drawer throughout their shift and compares totaled amount to computer generated proof sheet.

Carries out the bank's client retention strategies and proactively prospects for new business.

Actively refers loan, trust, and insurance and brokerage services to appropriate financial institution specialists.

Participates in sales, service and product training meetings.

Follows policies and procedures related to retail areas.

Prepares and maintains account paperwork, including signature cards, check orders, transfers and service charges.

Relates complete account information to customers in a timely manner.

 [www.csbnow.com](http://www.csbnow.com)

 **Main Office:** 102 W. Main St., Lena, IL 61048

 815.369.4524





Greets, rents, and admits authorized customers to safe deposit vault area.

Identifies needs of new and existing customers, and offers appropriate services currently available.

Greets and acknowledges all customers with a smile and "thank you for your business" or "have a nice day."

#### **ADDITIONAL DUTIES AND RESPONSIBILITIES**

Ensures that retail documents have proper signatures, dates, and other relevant data.

Originate, process, and verify accuracy of deposit documents.

Is responsible for accurate, prompt, and efficient customer transactions.

Understands and complies with related laws and compliance regulations.

Performs other duties as necessary.

#### **QUALIFICATIONS**

Good oral and written communication skills.

Knowledge and use of Microsoft Office computer applications: Word, Excel, and Powerpoint.

Good interpersonal communication and organizational skills.

Ability to operate standard office equipment such as adding machines and typewriters.

Excellent sales, interpersonal and communication skills.

Good understanding of financial products and services.

Above average computer and keyboard skills.

Good organizational skills.

Good analytical and interpersonal skills.

Ability to interact professionally with people.


#### **EDUCATION AND/OR EXPERIENCE**


High school diploma or equivalent

Successful completion of in-house training program.

2-5 years of experience in related field.

 [www.csbnow.com](http://www.csbnow.com)

 **Main Office:** 102 W. Main St., Lena, IL 61048

 815.369.4524





## PHYSICAL DEMANDS

Must be able to remain in a stationary position 50% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, office machinery, etc. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine, and computer printer. Occasionally positions self to maintain computers, including under desks.

## HOURS

Must be able to work approximately 15-30 hours/week, and should ideally have open availability 7:45 am – 5:30 pm, Monday through Friday, as well as Saturday mornings, 7:45 am – 12:30 pm, on an as needed basis.

## WORK ENVIRONMENT

This position will require time spent working in all branch locations, as needed. The worker is not substantially exposed to adverse environmental conditions.

**- Associates are held accountable for all duties of job -**

### Acknowledgement:

I have read and understand all of the above. I have reviewed the duties for which I am responsible, and understand this job description may be modified in writing at any time. This job description excludes marginal functions, incidental duties and special projects which I may be required to perform when assigned. I understand that this document does not create an employment contract and that I am employed by Citizens State Bank, Lena, IL, on an "at-will" basis.

Associate Signature: \_\_\_\_\_ Date \_\_\_\_\_

Human Resource Signature: \_\_\_\_\_ Date \_\_\_\_\_

 [www.csbnow.com](http://www.csbnow.com)

 **Main Office:** 102 W. Main St., Lena, IL 61048

 815.369.4524

