

## *American United Federal Credit Union*

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### **JOB DESCRIPTION – BRANCH MANAGER III**

#### **Classification**

Exempt

#### **Reports to**

Branch Administrator

#### **General Overview of American United Federal Credit Union**

American United is committed to reinvesting into the community every day with each employee dedicated to advocate for every member. As we strive to ***“Be the Difference that Makes a Difference in our Members’ Lives”***, we also pride ourselves in advocating for our employees to make sure they have the most competitive compensation, incentive program, health benefits package, career advancement, tuition reimbursement program, paid time off, and 401k match program in the industry and community. New full time employees enjoy 3 weeks of paid time off per year, fully vested 401k match program, and many positions have unlimited earning potential. American United is a quickly growing credit union because of our vision to invest into our members and employees. Join us and see why we’re different!

#### **Summary/Objective**

Using discretion and independent judgment, the Branch Manager leads the branch toward its primary objectives. Responsible for directing and administering the operational efforts of the branch. Ensures established policies and procedures are followed. Oversees provision of a full range of services to members and prospective members. Ensures members are promptly and professionally served. Trains, directs, and supervises branch staff. Branch asset size is over \$10 million. Manages a staff of more than 5 employees.

#### **Essential Functions**

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

1. Assumes responsibility for the effective and efficient performance of branch operations.
  - Supervises work scheduling and workflow of daily routine operations.
  - Ensures operations are conducted in accordance with established credit union policies and with legal and regulatory requirements.

- Ensures branch security. Opens and closes the building in accordance with set hours and tests security equipment quarterly.
- Acts as a Loan Officer, processing and approving member loans within established policies and limits.
- Supervises and assists with member service functions. Cross sells credit union services.
- Implements changes to established policies and procedures within the branch.

### **Competencies**

- Branch services are efficiently and effectively delivered in accordance with established credit union policies and standards.
- Current member accounts are maintained or expanded and additional ones solicited. Good business relationships exist with members and their questions and problems are promptly resolved.
- Branch personnel are well trained and efficient, and their activities well coordinated.
- Required reports and records are accurate and timely.
- Management is appropriately informed of area activities and of any significant problems. Suggestions are provided for improved efficiency or effectiveness in operations.
- Good working relationships exist with branch personnel. Assistance is provided as needed.
- Branch transactions, loan volumes, expenses, and profitability are in line with credit union standards.

### **Supervisory Responsibility**

This position manages employees in the department and is responsible for the performance management and hiring of the employees within that department.

### **Work Environment**

This job operates in a credit union. It is a professional environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

### **Travel**

This position may require up to 25% travel.

### **Required Education and Experience**

- Five to ten years of similar or related experience.
- A two-year college degree or (2) Completion of a specialized course of study at a business or trade school or (3) Completion of a specialized and extensive in-house training or apprenticeship program.
- The ability to motivate or influence others is a material part of the job, requiring a significant level of diplomacy and trust. Obtaining cooperation (internally and/or externally) is an important part of the job.

- A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature. Work may involve motivating or influencing others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary.
- Strong interpersonal, leadership, and supervisory skills. Well organized. Ability to operate related computer applications and related business equipment.

### **Preferred Education and Experience**

- Degree in Business Administration
- Management training

### **Additional Eligibility Qualifications**

#### Physical Activities and Requirements

- Talking: Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.
- Average Hearing: Able to hear average or normal conversations and receive ordinary information.
- Repetitive Motion: Movements frequently and regularly required using the wrists, hands, and/or fingers.
- Finger Dexterity: Using primarily just the fingers to make small movements such as typing, picking up small objects, or pinching fingers together.
- Average Visual Abilities: Average, ordinary, visual acuity necessary to prepare or inspect documents or products, or operate machinery.
- Physical Strength: Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally. (Almost all office jobs.)

#### Mental Activities and Requirements

- Reasoning Ability: Able to interpret a variety of technical instructions and can deal with multiple variables.
- Mathematics Ability: Ability to compute discount, interest, profit, and loss; commission markup and selling price; and ratio, proportion, and percentage. Able to perform very simple algebra.
- Language Ability: Ability to read financial reports, and legal documents. Ability to prepare manuals, and critiques.
- Ability to prepare and make comprehensive presentations and communicate professionally before an audience.

### **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of

activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

**Signatures**

This job description has been approved by all levels of management:

Manager: \_\_\_\_\_

HR: \_\_\_\_\_

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

**Intent and Function of Job Descriptions**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*