



**MountainOne Bank**  
93 Main Street, North Adams, MA 01247  
855.444.6861  
www.mountainone.com

## Regional Universal Banker

### About Us:

MountainOne is a mutual holding company headquartered in North Adams, Massachusetts. Banking, Insurance, and Investment products are offered at full service offices in the Berkshires (Pittsfield, North Adams, Williamstown) and on Boston's South Shore (Quincy, Rockland, Scituate). MountainOne is dedicated to the local communities we serve, with a mission of delivering solutions of real value that help individuals, businesses, and community institutions manage their financial lives with clarity and confidence.

- **MountainOne Bank**, founded in 1848, provides a complete array of personal and business banking and electronic services.
- **MountainOne Insurance** provides personal and business insurance, bonding services and group benefits solutions.
- **MountainOne Investments** provides individual investment services and group financial benefit plans (financial professionals offering securities and advisory services through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Advisor)

### Position Description:

The Regional Universal Banker will actively support the Community Banking division in our South Shore region in a new, more progressive Universal Banker role. As Community Banking continues to evolve within MountainOne, the Regional UB will lead by example and will have a positive impact on the morale and team culture. We are focusing our search internally in order to provide Mountaineers with an opportunity to develop within MountainOne. Reporting directly to the VP Regional Community Banking Officer, the Regional UB will exemplify excellence as a Universal Banker while providing mentoring, training and oversight to other Universal Bankers in the region.

The position oversees key areas of branch operations for the region including but not limited to responsibilities for branch audits, procedures, training, onboarding and account management. The Regional UB will assist customers with banking products, transactions, and other financial products/services as needed. This role will be responsible for head cash, in addition to assisting in training and coaching the tellers in the region, working closely with Branch Administration, and reviewing daily operational reports. The Regional Universal Banker will also proactively participate in the branch sales referral process. **In an effort to maintain a safe and healthy workplace, MountainOne now requires that all applicants for employment demonstrate that they have been fully vaccinated for COVID-19 as a condition of hire.**

## **Key Accountabilities and Responsibilities:**

The job performance of the Regional Universal Banking Officer includes the following, and other/related duties as assigned.

- Drive the MountainOne Customer Service Standard. Provide excellent customer care regarding daily transactions, proactively addressing inquiries, and resolving problems in accordance with bank policies;
- Perform all transactions of a teller; accepting deposits and loan payments, verifying cash and endorsements, cashing checks within limits and obtaining further authorization when necessary, issuing money orders, cashier's checks and redeeming savings bonds;
- Perform ATM/Debit card maintenance and new card orders;
- Develop and deepen customer rapport; have and use knowledge of account ownership, be responsive and timely with correspondence and problem resolution relating to customer inquiries and issues;
- Promote and advise on the bank's products and services, help roll out new products and services.
- Ensure customer profiles are updated. Have constant awareness of changes/opportunities affecting customer accounts;
- Coordinate staff schedules, training and onboarding for the region.
- Comply, keep updated with policies, procedures, compliance training; comply with BSA/AML/OFAC regulations and guidelines. Keep track of and participate in scheduled monthly audit requirements. Comply with the company's code of ethics;
- Maintain a position of trust and responsibility by keeping all customer business secure and confidential; educate and alert customers regarding fraud;
- Prepare individual daily balance of teller cash transactions, as well as other reports as necessary, including but not limited to: Teller over/ short, individual teller, branch, TCR and vault audits per month and quarter, daily branch cash balances, daily cash log;
- Manages the branch cash levels, tracks currency shipments and deliveries;
- Work with Branch Administration to roll out and train on new operational procedures and ensure execution and implementation.
- Monitor employee activities and provide guidance where needed, report any gaps to the CBO/ACBO;
- Encourage a positive work environment and culture for all employees
- Support teller line as the Subject Matter Expert, having thorough knowledge of policy and procedure, daily transactions;
- Ensures that tellers are highly trained and comply with all regulatory and security policies and procedures;

- Hold periodic staff meetings to discuss areas needing improvement, changes in procedures, new developments or services and to present general information;
- Work cooperatively in close communication and coordination across all company departments/functions. Develop a collaborative relationship with the Call Center, Compliance and Branch operations;
- Participate in cooperative team efforts to set/achieve goals, communicate, train and development staff;
- Demonstrate a strong commitment to the bank's culture and core commitments including community engagement; established service standards; serve as a brand ambassador externally.

## **Qualifications:**

### **Technical Knowledge/Skills**

- Math literacy and fundamental financial calculations;
- Fundamental teller transactions;
- Proficiency in Microsoft Office Suite;
- Systems knowledge (teller and customer management);
- Branch procedures; cash handling; ATM processes and procedures;
- Product knowledge, e.g. deposit accounts, loan products, features/benefits;
- Sales process; as relates to selling through, product promotion, cross-selling and making sales referrals.

## **Personal Skills:**

- Critical thinking; ability to logically evaluate information, solve problems, exercise good judgement;
- Goal-orientation; ability to expend the time, effort and focus necessary to achieve goals;
- Personal accountability and effectiveness; ability to act responsibly;
- Interpersonal skills; communication skills, including verbal, written and active listening;
- Empathy, ability to relate to and care for others;
- Flexibility, ability to adapt to situations and others;
- Detail-orientation and consistency; ability to organize activities, tasks and projects with accuracy;
- Teamwork, ability to participate cooperatively in setting and achieving team goals; participate in peer coaching;
- Customer service and relationship-management; strive to anticipate, meet, exceed customer expectations;
- Act and communicate professionally, with consideration, respect and courtesy.

## Experience:

- Associate's degree
- Minimum one year of banking experience

## Other Requirements:

- Flexibility and availability to service all banking hours, as needed
- Ability to travel up to 25% of the time outside a 25-mile radius
- Ability to sit, drive, bend, make/answer telephone calls

## To Apply:

Please email your resume and letter of interest to: [careers@mountainone.com](mailto:careers@mountainone.com). MountainOne is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, age, disability, or veteran status. (Compliant with VEVRAA and Section 503 rules)

MountainOne Bank is Member FDIC. Member DIF.  Equal Housing Lender.

**Insurance and Investments are not insured by the FDIC and are not deposits or other obligations of, or guaranteed by, any depository institution. Funds are subject to investment risks, including possible loss of principal investment.**

The financial advisors of MountainOne Investments offer securities and advisory services through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through CES Insurance Agency or MountainOne Investments. MountainOne Bank is not a registered broker-dealer or Registered Investment Adviser. MountainOne Bank and MountainOne Insurance are not affiliated with Commonwealth. MountainOne Investments' main office is located at 85 Main Street, Suite 100, North Adams, MA 01247. (413) 664-4025

