

## Employer Information:

Location: Greer, SC (primary) and Landrum, SC (as needed)  
Position: Customer Service Specialist / Administrative Assistant  
FLSA Status: Non-Exempt  
Hours: 8:15am – 5:00pm (Monday – Friday), additional when necessary



CBL State Savings Bank is seeking a *Customer Service Specialist / Administrative Assistant* to join our team! The qualified candidate will provide excellent customer service as a representative of the Bank. The primary function of this role will be to open/close deposit accounts (savings, CDs, and IRAs), process deposit and loan payments and disbursements, and maintain and balance a cash drawer. The other part of this role will be to provide administrative assistance to executive management when needed.

*Note: This job description summarizes the job duties and requirements that are essential to the evaluation of the job. It is not intended to be complete in detail. These responsibilities are typical for this job; however, on occasion, individuals in this position may be required to perform functions of a higher or lower skill level not included in this job description. Furthermore, other duties may be assigned by your direct supervisor.*

---

**Essential Functions:** To accomplish this job successfully, an individual must be able to perform, with or without reasonable accommodation, each essential function satisfactorily. Reasonable accommodations may be made to help qualified individuals with disabilities perform the essential functions.

- **Customer Service Specialist**
  - Learn, implement and maintain Bank policies and procedures
  - Process savings, certificate of deposit, and IRA transactions
  - Process loan payments and line of credit advances
  - Service CD renewals and process RMD withdrawals for IRA's
  - Assist customers with online banking questions and resolve any issues
  - Log and process night deposits and mail payments under dual control
  - Open new accounts: Savings, Certificate of Deposit and IRA's.
  - Complete checklist for new accounts and verify any changes made to existing accounts
  - Scan deposit documents
  - Check daily reports for changes made to accounts and verify proper documentation is received
  - Initiate ACH drafts for accounts
  - Process ACH rejects
  - Maintains cybersecurity awareness
  - Adheres to job-related BSA policies and procedures
  - Conducts all job-related and regulatory training require
  - Balance cash drawer and scan checks daily
  - Alternate vault cash drawer duties. Duties consist of balancing the vault daily, buy/sell cash, verifying check totals, and determining if the branch is over or short and taking necessary steps to resolve.
  - Process account research requests.
  - Answer incoming calls.
  - Other duties as assigned.

- *Administrative Assistant*

- Assist management with returning calls, emails, and other correspondence.
- Research and communicate with vendors to receive proposals, resolve issues, and ask general questions.
- Assist management with planning employee, management, and board meetings and events.
- Create letters, spreadsheets, and other documents as needed.
- Build data reports utilizing Bank's core provider report writing function.
- Complete errands as needed.

Qualification Requirements: To perform this job successfully, an individual must be able to perform each essential function and duty satisfactorily. The requirements listed below represent the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- High School Graduate or equivalent certificate.
- Minimum of five years of financial or business-related experience, preferably in the financial industry
- Knowledge of major banking laws and regulations
- Well-developed interpersonal and communication skills to interact with staff members, customers, vendors, and business associates
- Ability to multitask.
- Possess strong creative and critical thinking skills.
- Self-motivated and detail-oriented.
- Computer proficient in Microsoft Office.
- Promotes teamwork among colleagues.
- Excels in customer service skills.
- Be able to keep confidentiality of sensitive information a top priority.
- Present a professional image when dealing with customers, interdepartmental, and external representatives.
- Have reliable transportation to travel between CBL offices and other locations when needed.