

**PEOPLES BANK AND TRUST COMPANY  
JOB DESCRIPTION**

**JOB TITLE:** Deposit Account Specialist  
**DATE:** August 2024  
**DEPARTMENT:** Deposit Accounts  
**REPORTS TO:** Deposit Accounts Manager  
**STATUS:** Non-exempt

*To be considered for this position, please complete a PBT application.  
[www.pbtc.net](http://www.pbtc.net)*

**SKILLS REQUIRED:** Excellent communication and customer service skills. Strong knowledge of the Bank's various products such as checking, savings, CDs, IRAs, required forms, and necessary documentation required of each product. Requires typing skills and computer knowledge. Good proof-reading skills. Prior Personal Banker experience helpful. Ability to deal effectively and tactfully with phone calls and person to person contact. Must manage multiple phone lines efficiently.

**JOB SUMMARY:** This position will rotate between greeting our customers, directing them to appropriate departments or personnel to assisting our customers in opening/closing accounts. Selecting appropriate bank products and services, processes changes to existing accounts, scanning documents, and processing check order requests.

**PRIMARY DUTIES:**

1. Answers questions regarding our different services and connecting customers to the correct personnel – in person and over the phone.
2. Assists customers in selecting appropriate products the bank has to offer. Responsible for opening accounts such as checking, savings, CDs, IRAs, etc. Will process debit cards, check orders, enroll customers in online banking.
3. Verifies and processes changes to existing accounts. Will assist our customers with OAO using a bank tablet.
4. Maintains confidentiality of customer accounts. Educate and share information about fraud prevention with customers.

When acting as Frontline Deposit Account Specialist will be responsible for the following duties.

5. Process orders for checks, assist with debit cards, scanning documents, verify documents in Synergy, filing, simple notaries, birthday cards for customers, etc.
6. While working at the front desk you will be responsible for locking and unlocking doors during lobby hours. Help with the security of the building by knowing who is present in the building. Maintain the Visitor's Log and issue name tags.

7. Answers questions regarding our services and connecting customers to the correct personnel.
8. Maintains and distributes the list of weekend employees and the posting of holiday signs.
9. Knowledge of banking laws and regulations and Bank's policies and procedures including BSA.
10. Performs other duties/tasks as requested by Manager as they relate to the Bank and its functions.

**EDUCATION REQUIREMENTS:** Requires a high school education/GED or equivalent work experience that demonstrates the ability to read, write, interpret, and apply instructions to perform the required activities. Ability to use a computer. Valid Drivers License required.

**PHYSICAL REQUIREMENTS:** Ability to sit, stand, lift, bend, and climb ladder. May require being able to use check printing equipment if office prints checks. May require occasional heavy lifting of safe deposit boxes and mail items.

*Peoples Bank & Trust Co. is an Equal Opportunity Employer. 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.*