

PRESIDIO BANK JOB DESCRIPTION

Department: <i>Operations</i>	Position Title: <i>Client Services Manager (Relationship Service Manager)</i>
Reports to: <i>Chief Operations Officer & Market Manager</i>	Position Type: <i>Full-time</i> <i>(Monday – Friday, 8:00 – 5:00 pm)</i>
Location: <i>Mid-Peninsula- Palo Alto</i>	Prepared/revised by: <i>G. Datuin on 4/12/2019</i>

Position Overview:

This position involves close coordination with the Relationship Management team in welcoming new business into the bank and managing existing client relationships on a daily basis. This position is a key liaison to deliver clients the outstanding service that our Presidio Bank brand is built upon.

Principal Duties and Responsibilities:

- Key liaison with clients
- Client Service Activities (Handle client requests, transfers, wires, etc.)
- Customary Teller functions (Cash handling & balancing, deposit taking, etc.)
- New Account Opening (Ensure proper documentation in compliance w/ Bank policies & procedures)
- Deliver Cash Management Solutions (Online Banking, Remote Deposit Capture, ATM/Debit/Credit cards, Mobile Banking, etc.)
- Branch Administration (Liaison for 3rd party vendors, order supplies, and general office maintenance)
- Other projects or duties as needed or required.

Supervision: *Minimal supervision by Market Managers, Chief Operations Officer, and Relationship Managers*

Required Qualifications & Skills:

- Client Focused
 - Engaging with clients to build rapport
 - Problem resolution skills
 - Proactive attitude to ensure clients are pleased with their bank interactions
- Teamwork Oriented
 - Must work well with others
 - Approachable
 - Energetic, passionate, and driven to succeed

CLIENT SERVICES MANAGER JOB DESCRIPTION (CONTINUED)

- Professional skills
 - Requires minimal supervision
 - Ability to handle confidential information using discretion and judgment.
 - Highly organized (Punctuality, ability to set priorities, efficiency, etc.)
 - Ability to multi-task and maintain accuracy
 - Stress management and composure
 - Fast learner with the ability to pick up processes
 - Welcomes feedback and coaching
- Communication proficiency (reading, writing, speaking)
- Business Banking Knowledge
 - Previous experience in a bank or financial institution setting
 - Deposit products and services
 - Familiarity with all types of legal business entities
 - Knowledge of banking regulations and guidelines associated with banking products (BSA/AML, etc.)
- Advanced computer and technical skills are essential
 - Teller platform, Microsoft Office, etc.
 - Experience with banking software, like FISERV, PremierITI or Horizon
 - Installation and troubleshooting of online banking and remote deposit capture services
- Travel required occasionally to other regional offices.
- Education:
 - High school diploma or GED required
 - 4-year College Degree preferred
- Experience:
 - Over one year of experience in the banking/financial services industry
 - Over one year of experience working in client service
 - Experience with handling difficult client situations

Training and Advancement:

- Exposure to C-level executives providing career enhancing advice
- Industry specific courses & webinars provided

CLIENT SERVICES MANAGER JOB DESCRIPTION (CONTINUED)

Employer of Choice

Presidio Bank provides extensive training, guidance, and the opportunity to gain valuable experience in financial services within the banking industry. We strive to be an extraordinary place to work, having the best talent and friendly corporate culture. Communications are respectful, positive and honest, encouraging employees to take be proactive and take initiative. A healthy work-life balance is encouraged. Employees are proud to be a vital part of our community and we are recognized as being on the SF Business Times list of Top Corporate Philanthropists. Ultimately, hard work balanced with fun and laughter, makes Presidio Bank a desirable place to work.

About Presidio Bank

Presidio Bank provides business banking services to small and mid-size businesses, including professional service firms, real estate developers and investors, and not-for-profit organizations, and to their owners who desire personalized, responsive service with access to local decision makers. Presidio Bank offers clients the resources of a large bank combined with the personalized services of a neighborhood bank. Presidio Bank is headquartered in San Francisco, California and currently operates five banking offices in San Francisco, Walnut Creek, San Rafael, San Mateo and Palo Alto. More information is available at www.presidiobank.com. Presidio Bank is a member of FDIC, Equal Housing Lender, and Equal Opportunity Employer.