

**Job Classification:**

**Reports to:** Administration and Transfer Supervisor

**Work Schedule:** 8:00 a.m. – 4:30 p.m. Monday through Friday    **Location:** Custody

**Organization:** Community National Bank was founded in 1984 by a group of individuals in Nemaha County, Kansas with diverse local ownership with decisions made on a local level.

**Position mission:** Reviews transfer out requests, beneficiary claims, distributions, fees, and payments due. Posts requests on system network and ensures requests are processed. Performs routine follow-up.

**Major Duties:**

- Reviews transfer out requests for necessary requirements.
- Collects and sends invoices for fees.
- Reviews and posts distributions on system network.
- Prepares paperwork for registration of investments.
- Takes necessary steps to ensure request completion.
- Processes beneficiary claims.
- Completes other duties as assigned.

\*These tasks do not meet the Americans with Disabilities Act definition of essential job functions and are usually less than 5% of time spent. However, these tasks still constitute important performance aspects of the job.

**General Responsibilities:**

- Support CNB's strong relationship culture through quality customer service and superior product knowledge
- Provide superior customer service by resolving problems efficiently and responding timely
- Identify and implement solutions to problems in general and urgent matters
- Actively seek to add and enhance knowledge regarding developments and current trends in the industry
- Seek counsel of supervisor on issues as appropriate
- Work collaboratively with staff to maintain a team environment
- Flexible to accept additional assignments as requested by leadership
- Cross train for other positions to cover when necessary
- Professionalism while representing CNB (onsite, professional and community events and via communications)
- Participate and attend meetings as requested
- Recommend policies and procedures as it relates to area of responsibility
- Timely responses to inquiries for information to customers, staff, and vendors
- Answer telephone calls and provide a prompt response
- Follow CNB's policies and procedures
- Other duties as assigned

**Qualifications:**

- One to two years at a college or technical school.
- One to three years of clerical and/or finance experience preferred
- Excellent communication skills.
- Excellent data entry skills.
- Excellent administrative skills including evaluating, proofreading, planning, record keeping, and reporting.
- Ability to file, type, answer the phone, and use a ten-key.
- Knowledge of word processing and spreadsheet software.
- Knowledge of basic mathematical calculations including fractions, decimals, and percentages.

- Ability to read and write.
- General knowledge of IRS regulations.

**Physical Demands:**

The physical demands described are representative to those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee must be able to stand and sit for extended lengths of time, read computer screens, talk on the phone, unpack and move supplies up to twenty-five (25) pounds, reach, kneel, bend, climb and balance. Vision abilities required for this job include close vision.

**Work Environment:**

While performing the duties of this job, the work environment is primarily a professional, deadline driven environment with interaction of internal team members and external customers. Noise level in the work environment can be loud.

**Additional Duties:**

This job description is only a summary of the typical functions of this position, not an exhaustive nor all-inclusive list of all possible job responsibilities, tasks, duties, knowledge, skill and ability required to perform this job. Additional duties and responsibilities may be added to this job description at any time. The job description does not state or imply that these are the only activities to be performed by the employee(s) holding this position. Employees are required to follow any other job-related instructions and to perform any other job-related responsibilities as required.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate individuals. *Reasonable accommodations may be made to enable qualified individuals with disabilities to perform essential functions.* However, no accommodations are made which may pose serious health or safety risks to the team member or others, or which impose undue hardships on Community National Bank. An individual seeking an accommodation should contact the Human Resources Manager or CEO.



I can perform this job without accommodation

I need an accommodation to perform this job

*I have read and understand all aspects of the Job Description and agree that I am fully capable to perform the essential functions as outlined. If an accommodation is necessary, I will speak with the appropriate individual. I agree to perform to the best of my ability.*

Job descriptions are not intended to and do not create employment contracts. Community National Bank maintains its status as an at-will employer. Team members can be terminated at any time, for any reason not prohibited by law. Community National Bank is an equal opportunity employer.

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Employee Signature (and print name)

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Date

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Supervisor Signature (and print name)

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Date