



EXCEL FEDERAL CREDIT UNION
POSITION DESCRIPTION

Position: Branch Manager II

Reports to: COO

Date: June 26, 2026

Summary: To direct the operations of two or more Credit Union branch facilities, ensuring the branch meets organizational, financial, operational, service, and growth goals. Has limited lending authority.

Essential Functions & Responsibilities:

- Monitors all branch activities to ensure compliance with NCUA guidelines and established Credit Union policies and procedures. Ensures appropriate steps are taken to correct errors in a timely fashion.
- Assists members and associates as needed with deposit and loan account transactions and concerns. Identifies and makes recommendations for process improvements and improved products and services.
- Monitors production to ensure branch goals and objectives are met.
- Represents the branch as appropriate in its relationships with members, non- members, and community organizations and events.
- Hires, reviews, schedules, trains, and monitors the work of branch personnel: appropriately coaches and develops department personnel, conducts performance reviews; allocates resources to meet operational needs within the department.
- Performs other job-related duties as assigned.

Skills/Abilities:

- Maintain a cohesive, productive, highly trained, motivated staff sufficient to meet daily branch demands.
- Provide informed, professional and accurate service and support to all members and associates.
- Maintain or exceed annual branch operating and growth plan while maintaining or improving the financial stability of the branch.
- Develop and maintain business partner relationships with the community and area organizations by calling on and coordinating branch participation in community activities.
- Effectively evaluate the efficiency of the branch and develop specific recommendations for improvements to personnel, facilities, products, pricing, policies, and processes.
- Meet or exceed the established branch goals each month.
- Promote a sales culture within the branch by example. Coach and develop employees to identify cross-sales opportunities.

Knowledge and Skills:

Experience: Three years to five years of similar or related experience.

Education: A high school education or GED

Interpersonal Skills: Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.

Other Skills:

Georgia Notary Public

Bilingual a plus

**** The ideal candidate must be available to attend and actively participate in community events, demonstrating our commitment to fostering strong local relationships. ****