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# Example of Associate Banker Job Description

Our company is growing rapidly and is looking for an associate banker. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for associate banker

* Maintain pipeline reports on an ongoing basis
* Source and develop loans including but not limited to HELOC, Residential Loan and Commercial Loan
* Assist customers with financial needs such as cash withdrawals, deposits, transfers, loan/credit card payments, wire transfers and foreign currency exchange
* Highly motivated self-starter with a strong work ethic and focus on results with clients’ best interest in mind
* Communicates effectively and confidently while engaging with clients
* Supporting a Senior Private Banker with building a strong pipeline of engaged prospective clients
* Providing bespoke investment and strategic advice to high net worth individuals and their families
* Attend meetings with Senior Private Banker(s)/Directors and assist with the completion of various client reviews (e.g Suitability Reviews, Periodic reviews, Static reviews) and Credit proposals ensuring full understanding of the on-boarding process and have the ability to document client circumstances appropriately, with the ability to identify high risk and vulnerable clients
* Under supervision, understand existing client account types and portfolios (e.g asset classes such as Fixed Income/Equity) with the ability to communicate the Bank’s current thinking on balance of portfolios
* Liaise with Private Banker and middle office functions to ensure that the client proposition is effectively fulfilled and that all business transacted for clients and the post-sale service provided to clients meets the key Treating Customer Fairly outcomes

## Qualifications for associate banker

* Minimum 5 years financial services industry experience with exposure to lending and credit
* Ability to build and retain strong client relationships
* Working level interpersonal and communication skills in French and English
* General knowledge of credit policy
* General knowledge of consumer lending practices and banking/lending laws
* Understanding of Treating Customers Fairly Principles and application