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# Example of Banking Advisor Job Description

Our growing company is looking to fill the role of banking advisor. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for banking advisor

* Provide technical coaching to banking advisors for complex financing files
* Assist verifications agents with collections doubts and concerns and/or assist delinquent
* Minimum 7 years of experience in a Financial Services organization
* Guide and assist relationship managers in complying with the objectives of the KYC action plan
* Review client due diligence documentation and questionnaires
* Complete the RRAF forms with the Banking teams
* Contact with clients when necessary
* Work constructively with other stakeholders such as Compliance & Middle Office in the performance of their tasks
* Assist in the preparation of management information to enable tracking of progress versus KYC action plan targets
* Perform all duties in accordance with the principles outlined in the KH Code of Conduct, the policies and procedures relevant to your responsibilities, to ensure that you adhere to a culture that treats clients fairly and focuses on the long term sustainability of client relationships

## Qualifications for banking advisor

* Prior experience with bank transformation/conversion processes and procedures
* Completion of the Chartered Strategic Wealth Professional (CSWP) designation
* Professional Designations such as MBA, CA, LLB, CFA are desirable, however are not required
* 10 – 15 years of experience in High Net Worth Space and Business Development
* Completion of the Institut Québecois de planification financière (IQPF) designation
* Completion of Certified International Wealth Manager (CIWM) designation