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# Example of Banking Advisor Job Description

Our growing company is searching for experienced candidates for the position of banking advisor. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for banking advisor

* Perform the initial analysis of the applications received, in order to ensure that the solution requested meets the client's needs and is suitable for his profile
* Work closely with the Mobile Sales Force (RSM, FSS) and senior advisors
* Take charge of the referrals assigned to you efficiently
* Ensure credit applications are forwarded to representatives or directly to clients for cross-sales analysis
* Ensure credit applications are sent for analysis and carry out all the activities required to conclude the transactions
* Make proactive prospecting calls, with a view to encouraging financial advisors to refer potential clients with banking product needs to us
* Follow established processes and procedures rigorously and produce high-quality files that comply with the standards in effect
* Provide clients with an annual relationship management call and review
* Work with the WMC primary relationship advisors on any potential referral opportunities
* Implement practice management disciplines, partnering with WMC advisors to promote referrals resulting in new banking and lending relationships

## Qualifications for banking advisor

* Manage various activities including, but not limited to
* Recruitment & Resourcing - manage the hiring plan including the budget process and advise on contract negotiations and the closing of candidates
* Employee Relations - Provide managers with advice and manage a range of Employee Relations cases � including grievances, disciplinary, dismissal and redundancy
* Learning & Performance � provide input into the development of business unit specific training and development initiatives
* Compensation, Benefits and MIS - Support the year-end compensation round ensuring consistent and fair decisions are made in line with regulatory guidelines and frameworks
* Change Management - Guide business managers through change management initiatives including restructuring