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# Example of Banking Advisor Job Description

Our growing company is hiring for a 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

* Manage and retain a portfolio of 200-300 high value branch based Business clients
* Deliver an outstanding experience to Chase Business Banking clients by providing comprehensive and customized business banking solutions tailored to the financial needs and circumstances of the businesses
* Conduct regularly-scheduled, agenda-based meetings with each client to profile client needs and goals
* Understand how Chase Cash Management, Card, and Merchant Services solutions can work within the clients’ technical capabilities and resolve gaps
* Own client experience survey results for all assigned clients
* Partner with the PCA to build a loan and deposit portfolio through existing relationships, business development and internal referrals from commercial banking partners
* Provide loan and deposit products to affluent individuals and families including interim construction loans, mortgages, securities-based lending, private aircraft lending and exclusive deposit products
* In partnership with Credit Underwriting,Structure loan facilities, oversee underwriting and preparation of credit packages, and obtain credit approval for loan opportunities
* Maintain primary responsibility for management of the team’s loan portfolio on an on-going basis in conjunction with the PCA, and Relationship Associates (Lending Assistants)
* Partner with teammates to deliver investment management, trust and estate administration, and wealth strategy capabilities to clients

## Qualifications for banking advisor

* Experienced HR Advisor who is able to operate at a senior level in a challenging, fast paced environment
* Proven practical experience managing employee relations issues and complex compensation structures
* Experience within the professional or financial services sector, specifically with front office clients
* Deputise for Team Leader
* Assist the team leader in driving the team to ensure performance targets and deadlines are met and SLs maintained and performance is tracked and reported against SLA
* Completed Bachelor's degree in Business Administration, Finance, Economics or other related field, and 4 years of relevant experience or completed Master's degree in Business Administration, Finance, Economics or other related field, and 2 years of relevant experience or graduate NB University Program