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# Example of Personal Banker Job Description

Our company is growing rapidly and is looking to fill the role of personal banker. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for personal banker

* Participates in required training and staff meetings
* Maintains a complete understanding of and competency with products, services and the Bank’s business-customer acquisition strategy
* Monitors personal weekly/monthly sales efforts, ensuring sales targets and results are achieved
* May partner with leadership to mentor and coach CSR staff to enhance their sales skills
* Participates in branch events/sponsorships and is involved with groups and organizations within the community
* Perform all functions related to opening and closing accounts including assisting customers with the appropriate selection of accounts, performing research of customer accounts, and complying with BSA and CIP requirements
* Take responsibility for branch and individual goals through engagement with the customers and prospective customers to present and cross sell products and solutions to meet customers’ needs
* Maintain knowledge of all aspects of the teller line including processing transactions, balancing cash drawer and vault, and basic branch operations functions
* Adhere to all company compliance and guidelines
* Records administration including completing various logs, reports

## Qualifications for personal banker

* Understands / speaks Cantonese & Mandarin fluently is mandatory
* Understand / speak Cantonese & Mandarin required
* Understands / speaks French English fluently AND Mandarin and/or Cantonese an asset
* Initiate and maintain customer contact through a variety of methods,including,but not limited to face-to-face customer interaction (walk-in traffic),telemarketing and call night activity and community involvement (attending community activities that may generate new customer leads and supports Bank’s overall CRA goals and initiatives).Meet or exceed all established activity goals (face to face appointments,voice to voice calls, ) to drive sales and referral results
* Understand / speak English is an asset
* Understand / speak French fluently is a requirement