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# Example of Relationship Banker Job Description

Our innovative and growing company is looking for a relationship banker. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for relationship banker

* Responsible for opening checking accounts, savings accounts, and provides all other deposit product services at the customer’s request
* Achieve quarterly/annual goals through business generation of C&I, CRE, mortgages, SBA, treasury management, deposits, investments, cross-border, and other commercial and consumer products offered through East West Bank
* Take an active role in educating customers on other banking channels sales and service offerings
* Ensure the customer's needs are met by partnering with the appropriate specialist (branch team, FC, and MLO) to serve the customer's banking, mortgage and investment needs
* Process Transactions/Customer Service
* Uses customer portfolio to gain customer background and uses data to recognize and follow up on existing and future needs
* Solicits cross-sales and opens new accounts according to guidelines
* Effectively utilizes various sales delivery channels in order to achieve goals
* Solicits loan applications, obtains appropriate documentation, follows up and closes loans accurately the first time
* Achieves overall individual deposit, loan unit, dollar, and non-interest income goals

## Qualifications for relationship banker

* Minimum 1 year experience in a banking environment required
* Minimum 2 years of basic computer experience
* Must be in good standing under "The Secure and Fair Enforcement for Mortgage Licensing Act of 2008" (Safe Act) and must be registered/licensed with the "Nationwide Mortgage Licensing System and Registry"
* Achieves a minimum customer service score and adheres to the highest level of service standards
* Handles customer queries, special requests and problem resolution
* Handles fund transfers between accounts, overdrafts, stop payments, fee reversals