Downloaded from <https://www.velvetjobs.com/job-descriptions/relationship-banker>

# Example of Relationship Banker Job Description

Our innovative and growing company is looking to fill the role of relationship banker. 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 relationship banker

* Uncover needs and refer customers to a partner centric team that works with small business, corporate and institutional partners, and mortgage and financial advisors
* Maintain a high level of client satisfaction by engaging our customers and ensuring we are providing an optimal customer experience
* NMLS registered or ability to obtain NMLS registration
* 1+ year of previous retail banking experience or 1+ year of equivalent finance, sales or customer service experience
* Proven track record of exceeding goal expectations by exemplifying appropriate behaviors and values
* 1 year of experience in developing current and new customer relationships, achieving sales goals and building referral sources in banking or retail environment with customer service and cash handling experience

## Qualifications for relationship banker

* Experience in developing and executing sales strategies, branch marketing and business development
* Understanding of various phases of sales management, including planning, goal setting and selling techniques
* Customizes individual branch plan to meet local market needs
* Bachelor’s degree in business-related major preferred
* Life, Health, Series 6/63 required
* Life, Health, Series 6/63 licenses required