



Example of Associate Banker Job Description

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Our growing company is searching for experienced candidates for the position of associate banker. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for associate banker

- In agreement with the Team Leader when success is demonstrated in the Associate Private Banker role, when fully competent and sign off in the role, gradually take on a small number of clients from existing Bankers to start developing a client book of your own under direct supervision from your Team Leader
- Continuously seek out self-development opportunities by obtaining appropriate professional qualifications such as CISI Investment Advice Diploma (IAD) qualifications and expanding experience and product/industry knowledge
- Proactively seek out self-development opportunities internally by attending weekly investment meetings, Product and Services training and client events
- Contribute and achieve personal and team targets and conversion rate at quarterly intervals throughout the year with Team Leader
- Perform all duties in accordance with the principles outlined in the SGPBH Code of Conduct, the policies and procedures relevant to your responsibilities, to ensure that you adhere to a culture that treats clients fairly and focuses on the long term sustainability of client relationships
- Document large deposit over Currency Transaction Reports
- Identify fraudulent activity to prevent potential loss to the bank
- Ensure financial transactions are completed accurately and efficiently, while complying with all policies, procedures and regulatory and banking requirements
- Maintain strong relationships with existing customers and cultivate new

- Is confident in educating clients on conducting banking transactions online, via mobile app and self-service portals

Qualifications for associate banker

- Continual opportunities to expand your financial acumen, sales expertise and interpersonal skills
- Opportunities to develop your career and grow into new roles, such as a Wealth or Retail Management
- All applicants must possess an active Life/Health Insurance License and Series 6 & 63 licenses
- Willingness to work branch hours, which can include weekends and evenings
- Series 7 and 66 licenses required, or to be obtained within 90 days of employment
- Previous experience in customer service, retail sales, teller, or similar position is highly preferred