



Example of Banking Assistant Job Description

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Our growing company is looking for a banking assistant. 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 assistant

- Respond to requests for compliance advice from Personal Banking Department and the retail branches on the products and services offered (including current accounts, deposit accounts, credit cards, mortgage services), provide appropriate level of support to resolve the matters being referred and liaise with Legal and Compliance Department as necessary
- Review and update Product / Project Governance Documents to ensure all regulatory matters and risks have been considered and positively assist the business to overcome any obstacles
- Assist the Personal Banking Department and the retail branches with management of regulatory risks
- Proactively manage and prioritise activities including meetings, diary, contact / distribution lists and email management on a forward looking basis to ensure business priorities are being met
- Ensure the deadlines and business deliverables are met, appropriate follow up in timely manner
- Coordination of team meetings, including agenda management, booking meeting rooms, organising equipment/refreshments
- Coordination of travel arrangements and accommodation
- Screen incoming e-mails, phone calls and correspondence in professional manner redirecting where appropriate
- Collation of documents/ pack for meetings – management of extensive travel packs and organisation of itinerary for meetings for direct reports and wider

Qualifications for banking assistant

- Ability to coach and mentor branch staff to perform above job performance
- This position typically requires advanced personal computer skills with proficiency in word processing, spreadsheet, database, and graphic software packages
- Ability to handle varied work requirements
- Resourceful, willingness to learn new tasks
- Able to take initiative and manage and meet deadlines
- Ability to work independently and set priorities within demanding service levels and time frames