



Example of Banking Relationship Manager Job Description

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Our innovative and growing company is looking for a banking relationship manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for banking relationship manager

- Is responsible for active market coverage of prospective clients to achieve new client acquisition goals to generate new and incremental margin and fee-based revenue from both credit and non-credit ancillary product sales, including capital markets products and services offered by the Bank
- Minimum 10 years of demonstrated sales and business development experience of HNW/UHNW clients with proven results
- Demonstrated strong or advanced knowledge of Investments, Trust and Credit
- Highly effective in making referrals to and collaborating with internal professionals including, trust advisors, home lending officers, financial advisors and commercial officers to address client needs and grow the overall relationship
- Excellent verbal and written communication skills, preferably bilingual (English and Spanish)
- FINRA Series 6 and Series 63 Licenses are required
- Extensive experience in leading ecommerce projects, experience partnering with technology teams in delivery of customer-focused mobile functionality
- Prioritize projects based on data analytics and by developing financial models and business benefits
- Familiar with prevailing digital trends, ecommerce and digital vendors and applications in the financial services or ecommerce
- Bring customer obsession to simplify onboarding, use and engagement

Qualifications for banking relationship manager

- Sound knowledge of financial service products and services and client relationship management system
- Will require highly developed communication skills and the ability to influence others by persuasively presenting thoughts and ideas to gain commitment and agreement for proposed ideas and solutions
- Must be enthusiastic, resilient, and energetic
- To ensure internal and external customer satisfaction
- Should have strong relationship building as need to interact with various RL Branches & DSA/Channels for business
- Job Knowledge- The candidate would need to handle Sales for a gamut of products like Unsecured BL, BLOD & FCCR