



Example of Private Banker Job Description

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Our company is growing rapidly and is searching for experienced candidates for the position of private banker. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for private banker

- Summarize data describing current and long-term trends in investment risks and economic influences pertinent to investments
- Advanced Diploma in Financial Services (RG146)
- Tertiary qualifications in a related discipline would be highly regarded
- Implement practice management disciplines to ensure long term profitable growth of client portfolios
- Create & implement effective, customized client strategy documents and action plans to enhance share of wallet, retention, and profitability of existing and new client relationships
- Maintain awareness of opportunities to determine areas of operational risk or potential losses
- Manage a portfolio of clients domiciled in the North Asia region to create investment, wealth advisory, financing and lifestyle solutions that closely match the HNWI individual's unique financial objectives
- Be the client's point of contact for all queries and services relating to the Bank
- Establish an annual sales plan with the Manager and setting and working towards performance targets for revenue growth, new qualifying HNWI households and deep discovery activities that reflect performance expectations of similarly tenured PBs for the specific Region
- Responsible to ensure clear and adequate Source of Wealth, Source of Funds, references or other sources to corroborate reputation information where available, geographic risk is captured in the client file to support the on

Qualifications for private banker

- Must have a good understanding of tax, estate and financial planning and investment vehicles
- The incumbent must be able to relate comfortably with affluent and influential clientele in both a business and social content, demonstrating an ability to display a high degree of poise and professionalism at all times
- The successful completion of a course of study that will enable registration with the appropriate provincial securities commission to obtain a license to sell mutual funds
- Minimum of 10-15 years experience in private banking/asset management/Trust or Fiduciary
- Experience operating in an environment that stresses both individual accountability and team-based performance
- Credit, underwriting and loan structuring skills