



# Example of Private Banker Job Description

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Our company is looking to fill the role of private banker. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for private banker

- Support the sales and service team respecting and reinforcing role clarity to deliver on client needs
- Or exceed production goals
- Collects and analyzes information that reflects the current creditworthiness of customers and the current merits of existing loans
- Responsible and accountable for new strategic relationship acquisition and resulting new business generation
- Maintain and develop strong relationship with internal departments
- Private Banker will participate in Pre-screen and relationship strategy discussions with the Wealth Advisor, Credit Portfolio Manager, Investment Advisor and Private Banker
- Coordinate meetings, diaries and attendance at relevant meetings, including attending those where assistance is required with meeting notes
- Develop and manage a portfolio of private banking clients through a customized suite of products, in addition to traditional banking services consisting of credit, investment, insurance and mortgage products and services and deposit solutions
- Cultivate existing private banking tier clients and establish new relationships by calling on prospective clients to uncover prospects needs for products and services and recommend solutions
- Execute sales plans and strategies in order to help structure and solidify deals to ensure goals are consistently met

## Qualifications for private banker

- Strong team, client and service orientation problem solving ability and understanding of basic credit and tax analysis skills
- University degree (BComm, MBA , CFA), in addition to industry courses (eg
- Ability to generate minimum production revenue for loans
- Demonstrated awareness of changing financial markets and overall economic environment
- 7 years experience in direct financial sales, with 3 years of wealth management/private banking experience in the financial services industry
- Possess and maintain Series 6, 63 and Life licenses