



Example of Private Banker Job Description

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Our innovative and growing company 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

- Identify opportunities to deliver appropriate commercial, retail, insurance, investment and financial planning services
- Collaborate with other internal specialists and take ownership for resolving client's banking needs to ensure an exceptional Private Banking client experience
- Monitor current clients' banking relationship deposits and loans to proactively maintain asset quality
- Train and mentor Private Banking Service Officers and collaborate with branch personnel relative to training, customer service and referral practices
- Maintain knowledge and understanding of appropriate legislation and regulations affecting banking and customer interaction to ensure that all transactions and customer relationships are handled in a manner consistent with laws and regulations
- Ensure a high quality and compliant portfolio of client relationships by working within audit, compliance and regulatory guidelines
- Minimum of 5 to 7 years of experience in private banking relationship management with concentration in establishing high net work client base
- Ability to develop complex credit relationships with high net worth individuals and corporations/partnerships to provide appropriate financial direction
- Strong business acumen with strong attention to operational policies and procedures combined with strong sales ability and persuasiveness
- Some travel will be required to visit client sites (20%+)

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- Demonstrated responsibility suitable for supporting the relationship management & service delivery of a Private Banking team, knowing when to seek assistance from others on the team
 - Possess valid driver's license and own transportation
 - Bilingual fluency in both French and English will be considered an asset
 - Circa current 200 million USD AUM
 - Prior experience with a leading bank covering the MENA market
 - Ability to relate comfortably with affluent and influential clientele in both a business and social context, demonstrating an ability to display a high degree of poise and professionalism at all times