Example of Private Banker Job Description

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Our growing company is looking for a private banker. 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 private banker

- Use time effectively, balancing personal attention with use of other resources to deliver the Private Banking service
- Act as the link with the various private banking teams in arranging meetings, diary and attendance at relevant meetings where assistance is required with meeting notes
- Opens and services, with assistance of Commercial Private Banking Support Associates, new Bank accounts and loans for customers, adhering to policies and procedures to prevent new account fraud and BSA / USAPA violations
- Seek to become trusted advisor through regular client contact and relationship building
- Partner with other team members to achieve ultimate approval for new business and modifications to existing business, including active participation in and adherence to requirements of pre-screen & relationship strategy meetings
- Serve as client’s primary internal resource as it relates to lending and deposit needs
- Collaborate with peers, and mentor junior team members, as part of a team to ensure delivery of superior client service
- Complete banking portfolio responsibilities including portfolio reviews, renewals, oversee timely preparation of Team’s portfolio responsibilities including portfolio reviews (quarterly and annually), Credit Review, 5 Risk Rated, CAMP

- Supporting all banking and customized lending solution needs identified within their book of business

Qualifications for private banker

- Relevant business degree and, or NQF 6 equivalent or higher qualification in Finance or Commerce or Banking
- Three (3) years in a Sales and Relationship Management environment
- Relevant business degree and, or NQF 6 equivalent or higher qualification in Financial Management or Certificate in Financial Planning (CFP)
- Experience in driving and meeting targets in a sales environment
- Two (2) years' experience in client facing interaction selling wealth solutionsProficient in MS Office (Word, Excel, PowerPoint and Outlook) and the Internet
- The candidate will have strong relationship skills with experience of managing and handling the sophisticated needs of individuals and families