



Example of Relationship Assistant Job Description

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Our growing company is searching for experienced candidates for the position of relationship assistant. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for relationship assistant

- Identify selling opportunities to maximise income derived from the relationship
- To support RM to plan, monitor and manage new and existing account relationship in order to optimize return
- To support RM to actively cross sell and promote products and services of the Bank
- To prepare credit proposal write-up and deliver good quality annual review / new credit proposal (accuracy, completeness, depth of analysis)
- To assist RMs in handling daily queries, forms and resolve data quality issues
- To ensure the accuracy of the facility's regulatory administration and legal documentation, prepared for the purpose of ensuring bank's exposure to client is legitimate and enforceable
- Coordinates with National Billing Unit (NBU) to set-up new billing codes for clients upon receipt of instructions from the Project Managers
- Scrutinizes thoroughly the Information Circular and other documents received from Project Managers and completes the Communications Memos and Updates Cosmos Company
- Sets up Radar Work orders for Corporate Actions mailings within tight deadlines distribution and ensures mailings are complete and copies are sent out to Call Centre, branches, forwarding agents, the Relationship Manager
- Updates Information on Cosmos Company immediately after the mailing is done to provide the Call Centre the correct information to give it our clients, maintains statistical data for Corporate Action events

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- University degree major in business/accounting disciplines
 - Attend client meetings with RMs where the existing / prospective client's profile is likely to be appropriate for the service
 - Must have at least 1 -2 years of experience managing people
 - Prior experience with loan and deposit systems
 - Prior loan closing experience a must
 - Liaison with 3rd party administrators ensuring they comply with administration agreements and SLAs