# Example of Relationship Support Job Description

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

## Responsibilities for relationship support

- Provide support to WM clients, prospects and private bankers
- Basic knowledge of bank's deposit, loan and investment products including promotional campaigns and specific criteria for inclusion
- Provide support to Private Bankers facilitating the use of sales tracking and forecasting database (SalesForce), profitability database (RPM) and loan covenant monitoring database (LMS)
- Leading meetings for training purposes, designing solutions for enhancements of the system for operationalizing data from multiple legacy systems
- Project management with diligent deadline setting and regular communication
- Assist in moving existing or new business process to new CRM tools/systems/processes
- Reviewing, with the support of internal lawyers, of the legal documentation (Facility Agreement, NDA, ..) in accordance with internal guidelines
- Support the bankers who manage client relationships, source, originate, develop and often execute the firm's array of financing solutions and transactions
- Assist the product specialists and bankers with pitches for debt & equity capital markets, interest rates, FX, commodity derivatives, mergers and acquisitions and project finance
- Manage internal planning, budgeting, and compliance reports

- Knowledge in the Ptp Process
- Strong own drive
- High capacity to generate energy and create open atmosphere
- Some interruptions are present and may involve occasional exposure to demands and pressures from persons other than immediate supervisor
- 5 years in Deposit Operations or previous experience with exception item processing preferred
- Prior supervisor and/or coaching experience preferred