



# Example of Relationship Job Description

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Our innovative and growing company is looking to fill the role of relationship. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for relationship

- Complies with Bank Secrecy Act ("BSA"), OFAC Anti-Money Laundering ("AML"), and US PATRIOT ACT policies, procedures, by properly verifying the identity of any person/business opening an account, maintaining records of the information used to verify each customer and consulting lists of known suspected terrorists before opening an account
- Complies with the compliance policies and procedures
- Through known and developed prospects, originate loans that fit the bank's risk profile for Life Science loans
- Provide a high level of customer service to the needs of commercial banking finance clients seeking loans, prospecting, underwriting and originating new loans
- Participate in the management of the portfolio based on departmental objectives
- Assist in the restructure of adversely-graded loans and the foreclosure of problem loans, performing activities designed to preserve the loan principal, gather interest as possible and prevent the loan from being charged-off
- Present credit offerings to senior management and be able to respond knowledgeably and confidently to management
- Assist in development of markets, research and analysis of sales opportunities
- Utilizes a high degree of creativity and independence in developing and managing a large portfolio of diverse and complex banking relationships in the Technology division

## Qualifications for relationship

- Experience of cash flow businesses and property structuring including the use of insolvency processes
- Degree in Business, Finance, Legal or Engineering
- A minimum of 2 years experience in Banking sales (with at least 6 months track record)
- Strong knowledge in Treasury, Investment and Bancassurance products
- A keen understanding of the demands, trends and on-goings in the Singapore market
- CMFAS certifications are mandatory