Personal Banker Job Description



PERSONAL BANKER RESPONSIBILITIES INCLUDE:

- Help customers open and manage their bank accounts and finances
- Advise clients on financial services and resolve issues
- Reach out to prospective customers to sell our services

JOB BRIEF

We are looking for a personal banker to assist our customers in managing their bank accounts and finances. You'll be responsible for building long-term relationships with clients and cross-selling them our products and services.

Personal bankers should be excellent communicators with solid knowledge of banking processes and products. Sales and customer service experience can help you succeed in this role. The ideal candidate is bold and ethical, and possesses strong problem-solving skills.

RESPONSIBILITIES

- Advise customers on bank services for their needs (e.g. loans and credit cards)
- Manage customer bank accounts; open, close and oversee transactions
- Resolve issues with banking services and accounts
- Refer clients to inhouse financial experts, as needed
- Reach out to potential customers to generate new business
- Present financial products and services to existing and prospective customers
- Perform administrative duties (e.g. entering data into banking software)

REQUIREMENTS

- Proven experience as a personal banker; experience in sales or customer service is a plus
- Knowledge of personal banking practices and regulations
- Familiarity with banking software; excellent use of MS Office
- Ability to work diligently to meet targets
- Excellent communication and negotiation skills
- Customer-oriented approach to handling problems
- BSc/BA in Finance, Accounting or similar field preferred

SOURCE: https://resources.workable.com/personal-banker-job-description