Retail Banker Job Description



RETAIL BANKER RESPONSIBILITIES INCLUDE:

- Assisting with deposit and savings accounts
- Counseling customers on banking products and services
- Generating new business by selling to prospective and existing clients

JOB BRIEF

We are looking for a Retail Banker to assist our customers and advise them on their finances. You'll be the face of our bank and we'll depend on you to provide high-quality customer service.

In this role, you'll need to communicate effectively to serve a variety of customers. Excellent people skills and patience are critical to this position. We also expect you to be confident, reliable and quick to resolve issues.

RESPONSIBILITIES

- Open and close checking and savings accounts
- Advise customers on financial services (e.g. lines of credit and mortgages)
- Cross-sell products and services
- Approach and sign on new customers
- Collaborate with other professionals to ensure high-quality customer service
- Perform various clerical tasks (e.g. filing)
- Handle customer complaints and solve problems

REQUIREMENTS

- Proven experience as a retail banker or similar role; sales or customer service experience is a plus
- Knowledge of retail banking rules and procedures
- Working knowledge of banking software and MS Office
- Patience and problem-solving ability
- Customer-oriented attitude
- Outstanding communication skills
- BSc/BA in Accounting, Business Administration or related field

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