



Position Title: Private Banking Assistant

Reports To: Private Banking Advisor

FLSA Class: Non-Exempt

Purpose:

This position serves as the initial contact in the office for both existing and prospective customers with an emphasis on Private Banking customers. The primary duties include building strong customer relationships to identify potential financial needs as well as migrating customers and prospects to the appropriate delivery channels. In addition, provides support regarding daily activities pertaining to Private Banking customers.

Responsibilities:

- Provides excellent customer service while answering, screening and transferring inbound phone calls
- Provides personal service by receiving and directing visitors to include existing and/or prospective customers
- Informs customers of procedures for utilizing BrandBank's Virtual Teller Machine as well as performs other personal banking duties and support related to operational activities and financial services (e.g. completing customer information forms ("CIF"), managing debit cards, processing credit card applications, cashier's checks, setting up online banking, etc.)
- Refers and cross-sells products and services to customers as appropriate to help meet and exceed team goals (i.e. demand deposit accounts)
- Organizes and maintains files, correspondence and records in accordance with policies, procedures, processes, etc. (both inside the department as well as working with other departments)
- Assists with the creation and/or modification of presentations, spreadsheet and other professional documents and/or correspondence
- Organizes and maintains files, correspondence and records in accordance with policies, procedures, processes, etc. (both inside the department as well as working with other departments) such as customer and prospect lists
- Maintains inventory of office supplies and processes supply request orders as necessary

- Performs other day to day administrative tasks including scheduling and coordinating mailings, meetings and appointments as needed
- Handles complaints and concerns by telephone, written correspondence and/or in person including properly reporting and tracking in the company's case management system
- Maintains confidentiality of information including bank and customer records

Compliance Accountability:

- Responsible for compliance with all regulations, laws, and bank policies and procedures that pertain to your day-to-day job responsibilities.
- Responsible for maintaining a working knowledge of all compliance regulations pertinent to your assigned duties by successful completion of any courses assigned on a timely basis.
- Responsible for participating in BrandBank's community development program at least one day each year.
- Responsible for adherence to BrandBank's Code of Professional Ethics and Conduct as well as observing and promoting compliance with the Code among fellow bank personnel, customers and vendors.

Education/Work Experience:

- High school graduate or equivalent
- 3+ years of experience working in a financial services environment including Private Banking, Premiere Banking and/or bank branch environment
- Execute customer instructions on behalf of the Relationship Manager and/or Private Banker accurately in a timely manner in adherence to processes and procedures.
- Excellent communication skills and interpersonal skills
- Ability to conduct and complete consultative conversations
- Demonstrated ability to organize, plan, prioritize and meet deadlines
- Effective decision-making and problem-solving skills
- Strong skills in Word, Excel, PowerPoint and other content development tools
- Ability to manage workload independently with minimal supervision
- Must be flexible and comfortable with hours of operation, and possibly Saturdays
- Understanding of applicable compliance and regulatory requirements

BrandBank is an Equal Employment Opportunity (EEO) employer and welcomes all qualified applicants. Applicants will receive fair and impartial consideration without regard to race, sex, color, religion, national origin, age, disability, veteran status, genetic data, or religion or other legally protected status

To apply: <https://www.thebrandbank.com/careers>