



Position Title: Private Banking Advisor

Reports To: Commercial Market Manager

FLSA Class: Exempt

Purpose:

Serves the banking needs of high net worth (“HNW”) individuals who have relationships with BrandBank including principal/owners of business customers and HNW mortgage customers. Responsibilities include generating and maintaining private banking customer deposits and loans while acting as an advisor. Sales goals will be assigned with a focus on building the Private Banking book of business. Assists and supports management to ensure the operational excellence of the office while creating an excellent customer experience. Provides industry leading service while assisting with and supporting all aspects of sales, service and transaction activity in the office.

The ideal candidate will act as a solutions-oriented advisor to customers and prospects. In addition to creative problem solving skills, the candidates’ strengths should include proven networking ability to attract new customers and build long term business relationships in the community. They also possess relational traits including empathy towards customers (i.e. putting the customer first) as well as excellent credit/underwriting skills.

Responsibilities:

- Manages relationships with customers to ensure the financial needs of HNW customers are met and exceeded
- Provides expert financial advice and counsel to customers and prospective customers especially in the areas of private banking with a specific emphasis small business and/or consumer lending
- Maintains high standards of professionalism and credit quality while maintaining proper risk ratings and customer satisfaction
- Establishes and develops meaningful and long-term relationships with referral sources and centers of influence (e.g. rotary clubs, local chambers, etc.) in the Cobb and N.W. Georgia market
- Ability to interact confidently with customers with a proven track record of evaluating and providing solutions that address their financial goals and needs
- Partners and collaborates with commercial and mortgage stakeholders to ensure the customer needs are addressed with a 360-degree view
- Provides direction and leadership to teammates (e.g. Private Banking Assistant) with emphasis on:
 - Provides industry-leading customer service skills
 - Achieves team and individual sales, service, and referral goals
 - Operates in a team environment where duties will include a mix of management, sales/referrals, and transaction responsibility
 - Assumes responsibility for the office in absence of manager

- Provides operations oversight, ensuring compliance with policies and procedures
- Ensures compliance with internal controls, operational procedures, and risk management policies
- Supervises direct report(s) by participating in performance reviews, selection, and performance coaching.
- Ability to manage the operational needs of the office to include teammate readiness, compliance with policies and procedures, security standards and BrandStrong Service Standards

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

Experience:

- Bachelors degree or equivalent
- 7+ years of experience working in a financial services environment including Private Banking, Premier Banking and/or bank branch management role
- Private banking preferred
- Strong relationship management, lending (e.g. HELOC, small commercial loans, consumer loans, etc.) and new business development/sales skills
- Thorough knowledge of 'community' private banking products and services including credit processes
- Ability to make critical decisions as well as guide others to make decisions that positively impact the business
- Prior experience working with trusts and investments are a plus
- Demonstrated ability to interact confidently with customers and the ability to identify evaluate and resolve the financial needs of HNW customers
- Excellent presentation, written and verbal communication skills

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>