

Wealth Specialist

Retail Banking & Wealth Management

Closing date: 22 July 2015

HSBC Bank Bermuda Limited is seeking a Wealth Specialist who is responsible for financial advice and delivery of solutions completed through needs based selling, to the HSBC Mass and/or HSBC Advance markets clientele.

Major responsibilities

- Pro-actively promote, find solutions and service the needs of clients seeking advice in mortgages, investments, insurance or additional features and benefits related to HSBC Mass and Advance.
- Communicate proactively with clients as well as external and internal partners, to ensure delivery of excellent customer service.
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- Retain decision making authority in mortgage, investments and insurance applications

Minimum qualifications

- Preferably a Bachelor's degree in business, marketing, related field, or equivalent experience
- At least five years of experience in a banking position
- Professional designation in either Insurance or Investment, i.e. Series 7, CSC or equivalent
- Working knowledge of mortgages, insurance, and investments
- Strong interpersonal skills, with a proven ability to handle complex client negotiations.
- Courteous, willing to go beyond expectations to meet customer needs and resolve problems.
- Demonstrates skills in cross-sell, referral and customer service capabilities.
- Team player; easily develops good working relationships and willing to assist others to create an extraordinary service experience.

Interested applicants are invited to apply by sending your résumé and cover letter to:

Email:
recruitment.dept@hsbc.bm

Fax: 299 6524

Post: Recruitment Department,
Human Resources, HSBC
Bank Bermuda Limited, 37
Front Street, Hamilton HM 11

Application forms are available in all HSBC branches and at www.hsbc.bm. All enquiries will be held in strict confidence.

