



## Personal Banker

### Job Summary

As a Personal Banker, you will focus the majority of your time driving new business, helping clients and building long term relationships, in person and by phone through sales activities and referrals as well as through self-service and transactional activities.

Personal Bankers must thrive on client interaction, be flexible self-starters and enjoy working within a demanding and progressive, professional banking environment. Personal Bankers are expected to meet aggressive sales targets whilst nurturing strong working relationships with clients, colleagues and the operational units of the Bank to ensure the delivery of consistent high quality banking services.

### Primary responsibilities:

- Formulate a strategy to assist financially astute clients to accumulate wealth through a higher level of expertise and enhanced banking services, including the establishment and management of personal trust accounts and investment referrals
- Develop sales strategies with the VP Financial Services to generate new business
- Identify and seek new business opportunities and draw upon resources as needed – commercial banking, Clarien Investments, trust and insurance
- Work with our personal banking clients to build and deepen relationships by uncovering financial needs and recommending the best products and services
- Open personal accounts and sell banking products
- Quote rates, terms and programmes
- Respond to queries and concerns
- Identify and refer cross-selling opportunities to meet and exceed sales goals
- Engage clients in the banking hall, during product launches or assisting and educating clients on how to use our self-service options.
- Manage risk by ensuring regulatory requirements are met when onboarding and transacting for clients
- Represent Clarien at various business and community events with a view to strengthening client relationships
- Provide leadership and support to the Financial Services team
- Carry out special projects as assigned or other duties as required and directed by the VP, Financial Services

### The successful applicant must have:

- A University degree in Business or Finance or equivalent combination of formal training and experience.
- 2 years of demonstrated sales experience
- 2 years of client service experience
- Previous supervisory/management skills is an asset
- Skilled at assessing customer needs and providing applicable solutions whilst building client relations
- Good knowledge of financial management and banking products and services
- Ability to adapt to change and a commitment to continuous learning
- Ability to manage multiple priorities and client requests
- Superior oral and written communication skills for both internal and external purposes
- Ability to understand and implement processes and/or regulatory requirements
- Ability to apply strong critical thinking and problem solving skills to meet client needs

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience.

Please submit a detailed cover letter and résumé no later than September 22<sup>nd</sup>, 2016 to:

**Human Resources Department**  
**19 Reid Street, Hamilton HM 11**  
**P.O. Box HM 665, Hamilton HM CX**  
**Email:** jobs@clarienbank.com  
**Fax:** + 441 296 7701

www.clarienbank.com | 441 296 6969

Head Office: 19 Reid Street, Hamilton HM11, Bermuda | Paget Plaza: 161 South Road, Paget DVO4, Bermuda

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted.

Clarien Bank Limited through its wholly-owned subsidiaries is licensed to conduct banking, trust and investment business by the Bermuda Monetary Authority.