CLARIEN

Private Banking Officer

This position is responsible for providing administrative and strategic support to the Private Banking team. This role is focused on helping the department achieve the highest standard of client due diligence, customer service, relationship management and sales.

Primary Responsibilities:

- General admin (sales and service) support for Private Bankers;
- Support client relationship managers by providing client data and documentation management support for the onboarding of new clients and maintenance of existing client records with timeliness and accuracy;
- Documentation processing including completion, copying, logging, scanning, follow-up and filing;
- Coordinate with supporting business units as needed on behalf of the team to ensure that workflow processes are efficient and effective. Identify improvements and participate with supporting teams to assist in their implementation;
- Lead with reviewing quality assurance item findings and coordinating their resolution on behalf of the team;
- Processing of client requests including cash movements (hard currency, electronic (ACH and wires), CDs (e.g. renewals, breaks, maturities, research), trades (FX and securities), credit card payments, online banking, document collection / delivery;
- Reporting including periodic or ad-hoc preparation and improvement;
- Professional and timely communication including effective management of emails, phone calls, faxes and voice mails;
- Database activities including logging of client feedback, compliments, new business, client call reports, errors and omissions and operational issues;
- Perform client file reviews, and various tasks relating to CDD/AML/ATF initiatives;
- Research including transactional, statement, market, product and profitability analysis;
- Welcome desk / teller back up coverage during lunch time and periods of leave (sick and holiday); and
- Meeting and Event participation (team and client) including pre and post activities;
- Any other tasks as reasonably requested.

The successful candidate must have:

- Excellent communication and interpersonal skills;
- Solid academic achievement;
- Energetic drive, detail orientation and ability to handle fast paced environment;
- Confidence and competency to work alone and within a team environment;
- Aptitude to learn, be trained, be flexible and adapt to changing client environments; and
- Ability to interact directly with high net worth clients to execute transactions and handle inquiries.

In addition to the attributes listed above, the position will require the ability to prioritize multiple tasks, take direction from more than one Advisor, meet tight deadlines, work professionally and accurately under pressure, support team sales activities to achieve aggressive targets, build strong relationships with clients and colleagues across the organization, and solve problems / make decisions sometimes with limited guidance. The incumbent will also be proficient in Microsoft applications such as Excel, Word and PowerPoint. The position will also require being comfortable and effective in sales and relationship management situations and be committed to working synergistically with the team to achieve Clarien Bank and client goals.

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 January 3rd, 2018 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 DV04, Bermuda

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