



## Private Banking Officer

This position is located in Clarien Bank's Private Banking department. The incumbent will directly support the sales and service activities of a High Net Worth team of Wealth Advisors.

### Primary Responsibilities:

Job Accountabilities include (but are not limited to) the following:

- General admin (sales and service) support for Private Bankers
- Core system set up + maintenance activities including account openings and client (CIF) creations
- Documentation processing including completion, copying, logging, scanning, follow-up and filing
- Working with Compliance, Operations and all business support unit(s) to ensure the highest standard of AML/KYC/KYB/CDD are met.
- 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 complaints, compliments, new business, client call reports, errors and omissions and operational issues
- 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)

- Meeting and Event participation (team and client) including pre and post activities

### The successful candidate must have:

- The incumbent will possess the following attributes:
- 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
- Ability to interact directly with HNW clients to execute transactions and handle inquiries

### Skills and Abilities

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 April 21<sup>st</sup>, 2021 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.

Clarien Bank Limited through its wholly owned subsidiary companies is licensed to conduct bank, investments and trust business by the Bermuda Monetary Authority.