



## Personal Banker

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.
- Proactively identify opportunities to build and deepen relationships through interaction with clients and prospect clients.
- Develop sales strategies with the VP, Financial Services to generate new business.
- Ensure high standard service delivery and be genuine in interactions with clients and colleagues.
- Identify and seek new business opportunities and draw upon resources as needed - commercial banking, Clarien Investments, trust and insurance.
- Collaborate with other Banking units to assist in the cultivation and deepening of banking relationships, providing assistance and referrals when needed.
- Engage with and support clients with self-service options, in alignment with our digital strategies.
- 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.

### The successful candidate must have:

- Minimum Education: A University degree in Business or Finance or equivalent combination of formal training and experience.
- Minimum Experience: 2 years of demonstrated sales experience; 2 years of client service experience.

### Skills and Abilities:

- 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 October 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](mailto:jobs@clarienbank.com)  
**Fax:** + 441 296 7701

[www.clarienbank.com](http://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, corporate service provider and trust business by the Bermuda Monetary Authority.