



Senior Associate Private Banker

We are seeking an experienced and highly motivated Senior Associate Private Banker to join our team. The successful candidate will assist two Senior Private Bankers in managing and growing our client relationships. This role requires excellent communication skills, attention to detail, and a strong understanding of banking and financial services.

Primary Responsibilities:

Support Senior Private Bankers:

- Assist Senior Private Bankers in collecting and verifying all required documents for a seamless and compliant onboarding experience.
- Coordinate with internal departments to resolve client issues.
- Monitor and update client accounts regularly.
- Maintain and update client databases.

Client Engagement:

- Schedule and book meetings with existing and prospective clients as directed by Senior Private Bankers.
- Provide exceptional client service and respond promptly to client inquiries, delivering timely and accurate information to address their needs and concerns.
- Assist in the thorough preparation of client meetings, including the creation of agendas, gathering relevant documents, and preparing presentations.
- Conduct diligent follow-up after client meetings to ensure action items are completed and client satisfaction is maintained.

Compliance and Risk Management:

- Maintain organized records of all client documentation, ensuring completeness and accuracy for audit readiness.
- Aid in the preparation and submission of compliance reports, ensuring timely and accurate completion.
- Support internal and external audits by providing necessary documentation and information promptly.
- Identify and escalate potential compliance risks, working with senior bankers and compliance teams to implement appropriate controls.
- Participate in regular training and development programs to stay informed about best practices in compliance and risk management.

The successful candidate must have:

- Bachelor's degree in finance, Business Administration, or a related field.
- Minimum of 5 years of experience in banking, financial services, or a related role.
- Strong understanding of banking and investment products and services.
- Excellent communication and interpersonal skills.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint).
- Experience with CRM systems and client database management.
- Strong analytical and problem-solving skills.
- High level of accuracy and attention to detail.
- Knowledge of compliance and regulatory requirements in the banking sector.
- Proven ability to manage multiple tasks and meet deadlines.

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 August 30th, 2024 to:

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

Point House, 6 Front Street, Hamilton HM 11, Bermuda
www.clarienbank.com | 441 296 6969

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 services and trust business by the Bermuda Monetary Authority.

