

Personal Banking Advisor



Purpose

Personal Banking Advisor is the first point of contact for all new and existing customers with a strong focus on building and maintaining relationships. Deliver all customers with exceptional service while being responsible for providing banking solutions and options to help customers achieve their financial goals.

Role dimensions

- **Reports to:** Branch Manager
- **Division:** Customer Delivery
- **Direct Reports:** No
- **Financial Authority:** No

Person specifications

- New Zealand Certificate in Financial Services Level 5
- At least one year previous banking experience
- Sound written and verbal communication with a customer centric focus
- Excellent relationship management skills
- Proficient use of Microsoft office suite

Role specific areas of responsibility

- Understanding customer needs by delivering meaningful quality conversations, to help educate and engage with customers, to identify suitable options that help them meet their financial goals.
- Including the fulfilment of banking products and providing digital solutions to give customers options to complete banking their way
- Promote the Bank's full suite of lending and general banking services and work with the Manager to develop strategically important business referral alliances
- Create and develop long term relationships with customers to accurately understand and support their financial needs at each stage. Complete accurate records of all customer interactions. Increase growth and manage retention of the branch's customer portfolio
- Identify and refer customers to specialists across the bank MMM and SME Lending
- Take ownership to ensure our AML/CFT compliance expectations and requirements are achieved. Ensure that the Bank's Code of Conduct is always adhered to
- Ensuring compliance with relevant legislative requirements including but not limited to, AML, FAR, Privacy Act, CCCFA, Property Law Act, and the Code of Banking Practice. Identify and proactively report Conduct, Compliance and Operational Credit Risks, Incidents and near misses
- Comply with all health and safety policies, directions and instructions and ensure that in the performance of duties you are continually mindful of the Bank's Health and Safety Policies

From time to time there may be additional activity not contained within this position description that the appointee is to complete in the interests of the role and their own personal development.

This position description provides a broad overview of responsibilities. The position description is a living document, and the Bank reserves the right to amend from time to time as required.