

Personal Banking Advisor CEC



Purpose

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

Role dimensions

- **Reports to:** Team Manager
- **Division:** Customer Delivery
- **Direct Reports:** Nil
- **Financial authority:** Nil

Person specifications

- New Zealand Certificate in Financial Services Level 5
- At least one year previous banking experience
- Preferable 3+ years experience in a customer service role
- 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

- Provide the Banks customers and potential customers with professional, helpful and accurate guidance in the products and services offered by the bank.
- Promote the Bank's full suite of general banking and lending services and provide quality referrals to the banks external alliances, including internal specialist teams.
- 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.
- Take ownership to ensure all bank compliance expectations and requirements are achieved. Ensure that the Bank's Code of Conduct is always adhered to.
- All relevant banking policies are understood, and procedures are 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.
- Be actively involved and engaged in CEC and individual performance to improve results, skills and experience.

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.