Personal Banking Advisor

TSB

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:** Nil
- **Financial delegation:** Nil

Person specifications

- New Zealand Certificate in Financial Services (Level 5).
- 1-2 years' experience working within the Banking or Financial Services industry.
- 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

- Undertake meaningful quality conversations, taking the time to listen and understand customer needs and identify suitable solutions to deliver unparalleled customer service and care.
- Provide sound financial advice to help educate and engage with customers and support in meeting their financial needs and goals.
- Provide guidance and educate customers on digital solutions, discussing options for customers to complete banking their way.
- 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, taking responsibility for the management of customer cases and following through with leads and well as providing onboarding for new customers, and working with existing customers to ensure their banking is fit for purpose.
- When required, support the Branch by undertaking cash transaction functions, ensuring transactions are processed promptly, and accurate cash handling.
- Identify and proactively report Conduct, Compliance and Operational Credit Risks, and ensure compliance with relevant legislative requirements including but not limited to, AML, FAR, Privacy Act, CCCFA, Property Law Act, and the Code of Banking Practice.

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.