



Borel Private Bank & Trust Company[®]

A Division of Boston Private Bank & Trust Company

Business Area: **Deposit Management & Treasury**

Functional Title: **Assistant Office Manager – Los Altos**

Job Summary:

This role's main responsibilities are to provide sales and service excellence to clients and prospective clients of the Bank. Build strong client relationships and assist the Resident Manager with managerial duties as required. Perform additional internal operations functions or team leader functions in the absence of office managers.

Major Responsibilities:

Sales and Service

- Assist manager in developing and implementing a market and sales plan and participate in establishing team sales and service goals and objectives.
- Build internal and external relationships through exceptional problem resolution, ownership and follow-through.
- Assist Office Manager in consistently meet/exceed sales and referral goals by conducting client sales interviews, cross-selling, and up-selling products and services.
- Respond to difficult or complex product and service inquiries from clients, team and business partners.
- Model exemplary client service behaviors.
- Other duties as required.

Internal Operations

- Ensure compliance with all Federal, State and local laws and regulations as well as with BBPTC policies and procedures.
- Oversee income and expense management to minimize office losses and prevent fraud.
- Maintain office facility in absence of Resident Manager.
- Assign duties and schedule work flow.
- Ensure accurate and timely processing of platform transactions.
- Oversee all operational procedures pertaining to ATM.
- Supervise client service staff.
- Other duties as required.

Qualifications:

- 2-5 years of experience
- Managerial and supervisory experience required
- Outstanding organizational and leadership ability
- Strong sales skills

All Boston Private Bank & Trust Company employees are expected to adhere to the following competencies:

Core Competencies:

- **Client Focus**-Dedicated to meeting the needs of internal and external clients; listens effectively and establishes and maintains relationships and gains client's trust and respect.
- **Ethics, Integrity and Trust** - Considers ethical issues before decisions are made and seeks to achieve results that are in the best interest of the Bank.
- **Ownership, Accountability, Responsibility and Compliance** - Takes ownership of tasks, projects, and relationships and follows through on obligations and promises.
- **Self Development and Learning** - Personally committed to learning and actively works to continuously develop professionally.
- **Teamwork and Collaboration** -Works collaboratively; finds common ground and solves problems for the good of all and can represent his/her own interests and yet be fair to the team.

Supervisor Competencies:

- **Caring about Direct Reports, Fairness, and Listening** – Treats direct reports equitably; acts fairly; practices attentive and active listening and ensures that staff has the information, tools, and support to successfully complete job requirements.
- **Decision Making and Problem Solving** – Makes decisions in a timely manner, sometimes with incomplete information and under tight deadlines and pressure. Uses a mixture of analysis, wisdom, experience and judgment to solve difficult problems with effective solutions.
- **Delegating, Directing and Motivating Others** – Establishes clear directions; sets stretching objectives, empowers others and creates a climate in which people want to do their best, contribute and succeed.
- **Developing Direct Reports and Others** – Provides challenging and stretching tasks and assignments; holds frequent development discussions; coaches direct reports and others; is aware of each person's career goals.
- **Informing and Communicating** – Provides the information people need to know to do their jobs and to feel good about being a member of the team, business area, and/or the Bank. Provides information on a timely basis and is a clear communicator.
- **Planning & Organizing** - Accurately scopes out length and difficulty of tasks and projects for self and team; breaks down work into process steps; develops schedules and task/people assignments; sets objectives and goals; measures performance against goals and evaluates results.