



# Borel Private Bank & Trust Company®

*A Division of Boston Private Bank & Trust Company*

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Functional Title: Client Service Representative

Business Area: Deposit Management

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## **Position Summary:**

The Client Service Representative position requires a high level of client interaction in providing exceptional sales and service. Client Service Representative will identify cross-sell opportunities and make appropriate referrals. Provide assistance to Office Manager for operational and compliance tasks in the day to day operations of the office.

## **Roles and Responsibilities:**

### Sales & Service

- Promote service excellence by modeling exceptional client service characteristics to retain and build existing relationships with clients.
- Meet and exceed sales and service goals and objectives.
- Respond to difficult or complex product and service inquiries from clients, team members and business partners.
- Build internal and external relationships through exceptional problem solving, ownership and follow-through.
- Model exemplary client service behaviors.

### Internal Operations

- Ensure compliance with all Federal, State and local laws as well as BPB&TC policies and procedures.
- Ensure accurate and timely processing of platform transactions.
- Assist in all office operations with platform and teller processing.
- Oversee all operations procedures pertaining to the ATM
- Other duties as required.

## **Qualifications:**

- Degree preferred, not required
- 2-3 years experience in retail banking
- Superior client service skills
- Cross Selling Skills
- Strong communication skills – oral and written
- Organization Skills
- Systems & Technical Knowledge including Microsoft Word, Excel, PowerPoint and Access

### **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.

### **Individual Contributor Competencies:**

- **Decision Making and Problem Solving** - Makes decisions in a timely manner, uses a mixture of analysis, experience and judgment to solve difficult problems with effective solutions.
- **Informing and Communicating** - Proactively communicates information to colleagues up, down and across the organization, provides updates on projects, tasks and potential roadblocks.
- **Planning** - Accurately scopes out length and difficulty of tasks and projects and sets objectives and goals
- **Time Management** - Uses his/her time effectively and efficiently; values time; concentrates his/her efforts on important priorities and completes tasks and/or projects on time.