Borel Private Bank & Trust Company®

A Division of Boston Private Bank & Trust Company

Title: Deposit Relationship Manager

Reporting To: Director, Marketing

This position is responsible for generating new core deposit business. The emphasis is to establish Deposit Management relationships. The position requires an expertise in private banking as well as short-term money management. It is also important to model exemplary client service behavior, and recognize all cross-selling opportunities to Commercial Lending, Residential Mortgage and Investment Management in an attempt to create strategic relationships.

Roles and Responsibilities:

•Generate new core deposit relationships with the Bank's Deposit Management services. Responsible for selling all Borel Private Bank Deposit products and Liquidity Asset Management Program (Off Balance Sheet - Fee Service - Sweep Repurchase Agreements).

•Market the Bank's Cash Management products and services. Responsible for establishing new clients, along with providing expertise in demonstrations internally and externally.

•Provide short-term money management expertise for Bank's Deposit Management clients. This includes managing clients' day to day banking needs, involving operating accounts and cash management products, from overnight liquidity positions out to one year maturities. Requires knowledge of deposit products and services as well as other money market instruments.

•Account management responsibilities include being primary contact and officer for all new client relationships established, as well as existing relationships. Requires knowledge of general banking operations as it relates to account management for these clients.

•Build internal and external relationships through exceptional problem solving, ownership and follow-through. Provide a high level of personalized sales and service support to key client and strategic relationships within the Bank.

Internal Operations:
•Consistently meet/exceed sales, and cross-selling referral, to integrate client relationships among the Bank's four core business groups.
•Respond to difficult or complex product and service inquiries from clients, team and business partners.
•Ensure compliance of Federal, State and local laws
•Oversee income & expense management to minimize office losses and prevent fraud.

Qualifications:

- B.S. degree required.
- 5+ years of experience in Sales/Banking required.