



Borel Private Bank & Trust Company®

A Division of Boston Private Bank & Trust Company

Job Description

Organizational Unit: Investment Management & Trust

Organizational Title: Vice President, Senior Sales Professional

Reporting To: Sales Manager

Job Summary:

Incumbent is responsible for generating current repetitive fee income through investment management sales and specific custodial business. In addition, there is a responsibility to refer profitable cross-sell opportunities to Boston Private Bank & Trust Company's other business areas.

As a sales professional, it is expected that the incumbent will direct the sales process and build the resource team with care and professionalism. When the prospect becomes a client, it is expected that the sales professional maintains contact with our client; although it is understood that the portfolio manager directs the effort at this stage.

Responsibilities and Duties:

- Generate repetitive current fee income based on the designated goals with adherence to the sales plan.
- Meet the designated cross-sell objective.
- Work successfully as a member of a team of professionals.
- Maintain contact with clients that the sales person has been responsible for bringing to Boston Private Bank & Trust Company.

Note: This is not intended to be all-inclusive list of responsibilities as duties may change depending on business needs and your performance.

Requirements:

- 5-10 years of selling experience in the Financial Services industry. Investment Management sales is definitely preferred.
- A high level of technical experience with financial assets combined with a background in equity and fixed-income securities preferred.

For this position, submit your résumé via e-mail ONLY to Humanresources@borel.com . No telephone calls please.

For more information about Borel Private Bank, please visit our website at www.borel.com. Borel Private Bank & Trust Company is an Equal Opportunity Employer.