

Position Description

Position Title	Investment Services Officer
Reporting to Position Title	Manager (Investment Services)

1.0 Overall Purpose of the Position

Reporting to the Manager (Investment Services), the Investment Services Officer is responsible for the promotion and selling of Investments and Insurance products and services offered by the Bank within agreed limits and to provide investment advice.

2.0 Main Responsibilities

- To identify prospects and best way to contact these customers;
- To promote and sell investment and insurance products and services and provide financial advice if and when required by customers;
- To ensure that the required regulatory forms and related documents are filled and forwarded in a timely manner;
- To assure customer satisfaction by establishing a good rapport and ongoing after sales service;
- To keep up to date customers' records on file;
- To keep updated on the Banks' products and services;
- To inform branch colleagues about new investment and insurance products and provide the Manager (Investments Services) with up to date statistics on sales figures and leads generated on a regular basis;
- To ensure that leads generated by Call Centre and Branch staff are followed and feedback as necessary shall be provided;

- To identify prospects for transactions with limits which exceed their authorised limits and forward the leads to Supervisor (Investment Services) and/or Manager (Private Clients) as applicable;
- To assist the Manager (Private Clients) and/or Supervisor (Investment Services) in completing various tasks as delegated by the Manager (Investment Services) or Head (Asset Management);
- To cross-sells the Banks' products and services;
- To comply with compliance requirements;
- To collate and forward statistics required by the Investment Services Unit;
- To perform standard office procedures in relation to Investment Services Business;
- To perform any other duties which may be assigned from time to time by the Manager (Investment Services) or Head (Asset Management).

3.0 Skills and Knowledge Required

- Must be customer focused;
- Have a flair for sales;
- Must have a very good understanding of banking practices;
- Must be responsible, organised and meticulous in approach;
- Must have highly polished communication and interpersonal skills and be open to ongoing training and development;
- Must be able to work in the Investment Services team and be flexible in approach both with other staff and members of the sales team;
- Must be highly motivated and dynamic;
- Must be able to reach challenging but achievable targets;
- Maintain excellent relations with colleagues, Supervisor (Investment Services) and Manager (Investment Services);
- Be committed to studying for and obtain CEFA qualification to qualify for investment advice;
- Be prepared to work irregular hours both individually and as part of a team as required;
- Be expected to visit clients' homes or offices when necessary.