Head of Private Banking

Responsibilities

- Develop and execute strategic plan and roadmap to achieve Bank’s objective and target on private banking / private high net worth business
- Lead, manage and grow a team through providing guidance, coaching and training for staff development and fostering a high-performance culture and ensuring alignment with the sales strategy
- Oversee and ensure the daily operations and sales activities comply with internal and external requirements and relevant regulatory policies
- Acquire and grow high net-worth client base by providing professional financial solutions and effective relationship management
- Manage and monitor customer accounts on an ongoing basis, offer differentiated solutions to align with customers’ changing profile and investment needs and keep exceeding customer expectations
- Identify and pursuing new business opportunities to expand the client base and increase asset under management (AUM). Develop marketing and sales strategies to attract new clients.
- Collaborate with wealth management team to develop and enhance private banking products and services
- Stay updated on the latest market and industry developments to maintain the bank’s competitiveness in product offerings and customer experience
- Prepare sales management reports including sales pipelines and sales tracking and conduct business analysis for management review
- Participate in the development and implementation of compliance, systems, and procedures initiatives for private banking functions
- Provide comprehensive wealth management products, services , including investment advisory, asset allocation, portfolio management, estate planning, trust services and other relevant financial solutions to help private banking / private high net worth clients preserve and grow their wealth

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

Requirements

- Degree holder or above in Business, Finance or related disciplines
- 10+ years of relevant banking experiences in serving high net-worth clientele in retail bank or private bank, of which at least 5 years as managerial role
- Possess on qualification in HKSI
- In-depth knowledge in private banking business, market trends and regulatory environment
- Demonstrates a strategic mindset, good business sense, and a strong commitment to sales
- Excellent interpersonal and communication skills, capable of leading a sales team and collaborating effectively as a team player.
- Fluent in written and verbal English and Cantonese, with a communicative level of Mandarin
- Ability to adapt to a fast-paced, dynamic environment and stay updated with industry trends and regulatory changes.
- Mainly station in Macau, while some travelling in HK to cover GBA clientele

For more information or enquiry, please email us at **bdajob@delta-asia.com** or contact us at **+853 8796 9620**.

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

滙業銀行
Banco Delta Asia S.A.

Team Head

Responsibilities

- Provide premium service to private banking / private high net worth (PHNW) clients and families
- Lead the team to implement sales strategies and achieve sales targets to increase Asset Under Management (AUM) under private banking / PHNW customers' portfolio
- Set goals, provide guidance and support to subordinates in delivering premium service to banking / private high net worth (PHNW) clients and families
- Provide on-the-job coaching and intensive training for subordinates and support them to handle day-to-day partners related issues to ensure our quality services standard
- Lead projects in tailormade private banking product development and premium services to be offered
- Establish and maintain good relationship with business partners, design and negotiate cost-effective solutions to cater private banking / private high net worth (PHNW) clients and families' needs
- Provide professional advice and risk management solutions to private banking / private high net worth (PHNW) clients and families including deposits, credit facilities, investment funds, bonds, life insurance and trust service, etc.
- Ensure the selling processes and activities are in compliance with internal policies, procedure and all applicable regulatory guidelines

Requirements

- Degree holder or above in Finance, Business or related disciplines
- Minimum of 10 years' relevant experience in Private Banking and PHNW segment with solid leadership role
- Possesses professional licensing qualifications as required by local regulatory bodies
- Resourceful with strong customers network for private banking / PHNW in Macau
- Familiar with the Private Banking and PHNW products and services together with related laws, rules and regulations
- Strong leadership capability and management skill
- Excellent communication and presentation skills with good command of both spoken and written English, Cantonese and Mandarin

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

For more information or enquiry, please email us at **bdajob@delta-asia.com** or contact us at **+853 8796 9620**.

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

Relationship Manager

Responsibilities

- Developing and managing portfolio of private banking / private high net worth (PHNW) customers and families by providing tailored wealth management solutions including deposits, credit facilities, investment funds, bonds, life insurance and trust service, etc.
- Optimize client assets and revenues through portfolio management of Asset Under Management (AUM) under private banking / PHNW segment
- Understand private banking / PHNW customers' wealth management needs and formulate appropriate solutions to meet the needs based on individual customers' circumstances and risk appetite
- Actively explore and identify business opportunities
- Build strong and trustworthy relationships with existing and private banking / private high net worth (PHNW) customers and families
- Develop and maintain relationship with business partners and assist in supporting marketing and business prospecting activities
- Ensure the selling processes and activities are in compliance with internal policies, procedure and all applicable regulatory guidelines

Requirements

- Degree holder in Business Administration, Finance or related disciplines
- Minimum 5 years' solid experience in serving private banking / PHNW customers / families with portfolio management
- Possesses professional licensing qualifications as required by local regulatory bodies
- Strong client network to private banking / private high net worth (PHNW) in Macau
- Ability to provide strong financial and statistical analysis
- Excellent commercial, relationship building and negotiation skills
- Excellent communication and presentation skills with good command of both spoken and written English, Cantonese and Mandarin

(Candidates with more experience will be considered as Senior Relationship Manager)

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

Product Specialist (Investment Product)

Responsibilities

- Lead the development and review of investment product strategies and wealth management (Investment & Insurance) solutions, aligning with overall business objectives and market trends
- Manage the end-to-end product life cycle from product development, ongoing due diligence and channel management
- Identify opportunities for product improvement and differentiation, focusing on efficiency, standardization, scalability, and driving improvements in sales effectiveness and customer experience
- Support various kinds of investment sales activities & client meetings and work closely with sales team to meet sales target
- Provide technical expertise and support to internal stakeholders, delivering trainings and marketing materials to the sales team and intermediaries to enhance product knowledge continuously
- Ensure tasks are executed and controlled within the appropriate risk level and compliance with internal and external regulatory requirements
- Conduct on-going market intelligence to maintain business competiveness
- Perform all other related duties as assigned

Requirements

- Bachelor degree in Business, Finance or a related discipline
- 8+ years of relevant experience in private banking, wealth management and/or retail banking premier sector
- Licensed by SFC for regulated activities Type 1,2,4,5,9 and qualification in IIQE
- Professional qualification as CFA or CFP is a plus
- Demonstrate comprehensive knowledge of wealth management product cycles and solid understanding of regulatory requirements
- Strong market sense with sensitivity to market changes and proactive to drive business growth
- Strong analytical and project management skills, able to multitask and meet tight deadlines

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

- Excellent presentation, communication and interpersonal skills
- Good command of both spoken and written English and Chinese
- Proficient in MS Office applications including PowerPoint presentation

For more information or enquiry, please email us at **bdajob@delta-asia.com** or contact us at **+853 8796 9620**.

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com

客戶經理 / 助理客戶經理

工作職責

- 提供優質客戶服務，維護企業專業形象
- 向客戶提供投資產品的諮詢服務、投資策略分析及理財方向
- 負責分行產品銷售及客戶關係的維護與拓展
- 制定業務發展和銷售計劃，達成分行的業務指標

任職條件

- 大學畢業或以上學歷，主修金融、經濟、市場管銷或工商管理等相關專業
- 有銀行客戶服務經驗優先考慮
- 對金融或保險產品有認識，並能向客戶提供投資產品的諮詢服務並具管理經驗者優先考慮
- 符合澳門金融管理局規定買賣金融產品或就產品提供意見之資格優先
- 熱誠有禮，誠實可靠及有上進心，待人親切並具備良好社交技巧
- 流利中文及英文溝通及書寫能力

如有任何查詢，請電郵至 **bdajob@delta-asia.com** 或致電 **+853 8796 9620** 聯絡我們。

All information provided will be treated in strict confidence and only be used for recruitment purpose.

Website: www.delta-asia.com