

## **Retail Banking**

### **OUR OPPORTUNITIES**

#### **Retail Branch & Wealth Management**

**Branch Manager**

**Branch Deputy**

**Offshore Relationship Manager**

**Premier Relationship Manager**

**Personal Financial Consultant**

**Branch Operation Officer**

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## **Retail Branch & Wealth Management**

### **Branch Manager**

#### **Responsibilities:**

- Responsible for overseeing the overall operations and performance of our branch, ensuring the delivery of exceptional customer service, and driving business growth
- Develop and implement strategic plans and initiatives to achieve branch objectives, including sales targets, customer satisfaction goals, and operational efficiency
- Monitor and analyze branch performance metrics, identifying areas for improvement and implementing action plans to drive results
- Ensure compliance with all regulatory requirements, internal policies, and procedures, and maintain a strong control environment within the branch
- Stay updated on industry trends, market conditions, and competitor activities, and proactively adjust branch strategies to capitalize on emerging opportunities
- Coach and motivate branch staff to build a professional and capable workforce
- Meet the assigned annual business target

#### **Requirements:**

- Bachelor's degree in Business Administration or a related discipline
- Relevant qualifications such as HKSI, CFA, or CFP
- In-depth banking knowledge, branch operation and management skills
- Minimum 8 years' banking experience, with 5 years in managerial position
- With experience in promoting various wealth management products
- Strong self-motivation and drive to succeed, with ability to work under pressure
- Good communication, interpersonal, and analytical skills

- Proficiency in both English and Chinese

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\*Personal data collected will be kept confidential and used for recruitment purpose only.

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## Branch Deputy

### Responsibilities:

- Responsible for supervision of the administration matters of a branch and is required to provide necessary business / marketing support to the Branch Manager in conducting day to day business activities
- Supervise subordinates to ensure branch staff 100% adherence to Bank's compliance requirements and strictly comply with the Bank's policy in maintaining sound risk management of the branch at all time
- To ensure branch operation and control are properly managed at all time in accordance with laid down procedures, guidelines and audit comments
- Keep staff informed of pertinent changes in operational policies and procedures
- Provide guidance and support to assist subordinates to resolve customer issues and queries in a timely manner
- Review and authorize branch transactions and documents, substitute branch officer role when absence

### Requirements:

- Bachelor's degree or above
- Sound banking knowledge on deposit, mortgage, loan, branch operation and management skill
- Minimum 5 years' relevant experience in branch network of retail banking
- Able to solve business difficulties and work under pressure
- Good leadership skill to drive excellent services
- Good command of written and spoken English and Chinese

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## Offshore Relationship Manager

### Responsibilities:

- Developing channels for the acquisition of new-to-bank offshore customers and managing existing relationship, work closely with offshore customers to know and understand their needs and provide banking and wealth management solutions that meet their objectives.
- Manage and grow a portfolio of high-net-worth offshore customers with quality and professional services.
- Act as the key contact with strategic / potential partners in Macau and Mainland China to build and maintain effective business relationship.

- Maintain and deepen the relationship with offshore customers to ensure long term loyalty and retention.
- Meet business targets by proactively identifying sales opportunities and cross-selling relevant bank services / products, including insurance and investment, to the offshore customers.
- Ensure smooth branch operations and adhere to relevant guidelines and procedures.
- Assist superior to coach and mentor junior staff to better meet branch sales targets.

#### Requirements:

- Bachelor's degree or above
- Sound knowledge of retail banking products including mortgage loan, wealth management products (i.e., Investment & Insurance), credit card, etc.
- Minimum 3 years of sales experience in the banking services
- Exhibit strong interpersonal and communication skills, good command of written and spoken of English and Chinese (Putonghua)
- Creative and possess the initiative, drive, and ability to work independently and in a team; has the drive to succeed and is focused and disciplined to achieve the sales quota and revenue

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## Premier Relationship Manager

#### Responsibilities:

- Manage and grow a portfolio of high-net-worth customers with quality and professional services
- Act as the primary point of contact for customers to understand their banking and financial needs and provide customized financial solutions
- Maintain and deepen the relationship with customers to ensure long term loyalty and retention
- Meet business targets by proactively identifying sales opportunities and cross-selling relevant bank services / products, including insurance and investment
- Ensure smooth branch operations and adhere to relevant guidelines and procedures
- Assist superior to coach and mentor junior staff to better meet branch sales targets

#### Requirements:

- Bachelor's degree or above
- Insurance License & Investment Qualification (academic or professional qualification)
- Sound knowledge of retail banking products including mortgage loan, wealth management products (i.e., Investment & Insurance), credit card, etc.
- Minimum 3 years of sales experience in the banking services
- Exhibit strong interpersonal and communication skills

- Creative and possess the initiative, drive, and ability to work independently and in a team; has the drive to succeed and is focused and disciplined to achieve the sales quota and revenue

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## Personal Financial Consultant

### Responsibilities:

- Build and maintain positive relationships with mass customers by delivering high-quality customer services
- Identify customer banking / financial needs and recommend appropriate services and products to assist them achieving their financial goals
- Meet business targets by proactively identifying sales opportunities and cross-selling relevant bank services / products, including insurance and investment
- Ensure smooth branch operations and adhere to relevant guidelines and procedures
- Assist superior to coach and mentor junior staff to better meet branch sales targets

### Requirements:

- Bachelor's degree or above
- Insurance license
- Sound knowledge of retail banking products including mortgage loan, wealth management products (i.e., Investment & Insurance), credit card, etc.
- Minimum 1 years of sales experience in the banking services
- Exhibit strong interpersonal and communication skills
- Creative and possess the initiative, drive, and ability to work independently and in a team; has the drive to succeed and is focused and disciplined to achieve the sales quota and revenue

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## Branch Operation Officer

### Responsibilities:

- Monitor counter operations to ensure full compliance with bank policies and procedures
- Develop and maintain customer relationship to ensure high level of customer satisfaction
- Review branch documents and authorize branch transactions to ensure compliance and accuracy
- Assist to motivate and coach front line staff to provide high quality of customer service to clients
- Perform cashier duties, handle ATM/CDM close-out, act as cash vault key/combination custodian
- Handle customers' loan applications and prepare credit proposal

- Handle general enquiries from other branches, internal departments and other stakeholders
- Handle clerical work for branch operations

### Requirements:

- Bachelor's degree holder
- Minimum 5 years of experience in branch network of retail banking
- Able to work independently and with good team spirit
- Solid understanding on AML/CDD process
- Proficient in English and Chinese

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### OUR BENEFIT

As rewards to high achievers, we offer an attractive remuneration package which includes:

- Performance bonus
- Meal allowance
- Sales incentive
- Provident fund scheme
- Medical coverage
- Paid annual leave
- Education subsidy
- Low-interest staff mortgage plan
- High-yield payroll account
- Wellness allowance