

SKILLS FRAMEWORK FOR FINANCIAL SERVICES						
SKILLS MAP - ASSISTANT RELATIONSHIP MANAGER - PRIVATE BANKING						
Sector	Financial Services					
Track	Sales, After Sales, Distribution and Relationship Management					
Occupation	Relationship Manager					
Job Role	Assistant Relationship Manager - Private Banking					
Job Role Description	The Assistant Relationship Manager - Private Banking supports senior team members in servicing client accounts. He/She focuses on providing excellent client service to understand clients' requirements. He provides information pertaining to client accounts as well as collates reports, prepares client documents and follows-up with clients if clarifications are necessary. He reviews relevant client information to determine if any escalation is required to senior team members. He also supports his team with ad hoc administrative duties to ensure that optimal client service is provided.					
	The Assistant Relationship Manager - Private Banking is pleasant and personable in nature to build rapport with his team and other relevant individuals. His duties require him to be meticulous with details and a team player. He is also self-motivated to excel in delivering quality services. He is articulate and able to communicate well with others but also values listening to learn from others. He is able to manage his time and prioritise his responsibilities. A typical, although not mandatory, entry route into this role is via a Retail Banking Relationship Manager background.					
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Acquire and manage portfolio of customers	Key Tasks		Performance Expectations (For legislated / regulated occupations)	
			Support strategies to identify new clients through market segmentation research	If role is scoped to provide advice directly to customers on investment strategies that cover dealings in securities, futures, collective investment schemes, REITs, funds and/or capital markets, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 1A, 1B, 2A, 3, 4A, 4B, 5, 6, 6A, 8, 8A, 10		
			Communicate with product specialists and other internal stakeholders to support clients relationships			
		Support identification of credit and operational risks				
	Advise customers on products, services and investment strategies	Collate documents for team members to present financial solutions to clients				
		Provide assistance in portfolio metric reporting				
		Demonstrate an understanding of internal and external compliance and regulatory guidelines				
		Execute strategies for cross-selling and up-selling of products and services				
	Manage customer lifecycle end to end	Support delivery of suitable service offerings that fit clients' objectives				
		Gather customer documents for Know Your Customer (KYC) and onboarding procedures				
		Respond to enquiries in a timely fashion to help support positive client experiences				
		Assist in monitoring financing plans and escalate conflicts				
		Identify and flag suspicious transactions under account portfolio for further review				
Skills and Competencies	Technical Skills and Competencies			Generic Skills and Competencies (Top 5)		
	Account Management	Level 3	Communication	Intermediate		
	Business Negotiation	Level 3	Interpersonal Skills	Intermediate		
	Business Opportunities Development	Level 3	Service Orientation	Intermediate		
	Client Investment Suitability	Level 3	Decision Making	Intermediate		
	Customer Acceptance Checking and Onboarding	Level 3	Problem Solving	Intermediate		
	Customer Experience Management	Level 3				
	Customer Relationship Management	Level 3				
	Cybersecurity	Level 3				
	Ethical Culture	Level 3				
	Market Specialisation	Level 3				
	Product Advisory	Level 2				
	Risk Management	Level 3				
	Service Challenges	Level 3				
	Stakeholder Management	Level 3				
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services					

The information contained in this document serves as a guide.