
Private Banking Support Specialist

Full Time, Non-Exempt
Reports to Client Experience Manager
July 16, 2020

Who We Are

At Seattle Bank, our mission is to be a unique financial resource to our community by providing our clients a personalized experience and peace of mind. We know that we create value for clients by aligning the right resources behind them and their dreams. We achieve that alignment through a shared sense of vision, urgency, and possibility.

We're unlike most banks, in that we are highly focused on providing tailored services to individuals and families, business owners, and businesses. That focus enables us to customize solutions to a unique personal or business situation. We leverage a great team and great technology to move quickly, and to make things easy for our clients.

Position Summary

The Private Banking Support Specialist supports the Bank's Private Client Managers in day-to-day activities, interacting with clients via email, phone, and social media. The role is responsible for ensuring client requests are handled in a professional and timely manner, and our clients walk away from the interaction feeling great about their bank.

Essential Duties

- Support Private Client Managers for all private client banking needs, including onboarding new clients and assisting with the daily maintenance of debit and credit cards, online and mobile banking.
- Respond to and resolve all client issues expediently, including password resets, login attempts, limit increases, and travel notices for debit and credit cards.
- Support treasury management clients, which includes Wires, ACH, RDC installations, limit increases, treasury reviews.
- Support Private and Commercial Banking clients ensuring a seamless client experience.
- Create and edit bank and system procedures.
- Identify, create and implement process efficiencies.

• seattlebank.com
• 206.281.1500



Private Banking Support Specialist

We'd love to hear from you if have:

- Six or more years of banking and customer service experience.
- Bachelor's degree or equivalent combination of relevant education and experience.
- Comprehensive knowledge of bank product offerings. Ability to obtain quick proficiency in new key business systems to support a breadth of client solutions.
- Advanced knowledge of relevant state and federal banking regulations, FDIC insurance, operational policies and procedures, and product features.
- Effective organizational and time management skills.
- Relevant math proficiency, including ability to reconcile accounts, locate routine mathematical errors and develop and interpret basic charts and graphs.
- Exceptional verbal and written and interpersonal communication skills, including the ability to write reports, correspondence and procedures, and interact professionally with customers and coworkers.
- Excellent customer service and problem-solving skills, and the ability to identify and resolve complex issues quickly.
- Demonstrated big-picture thinking in a fast-paced & ever-changing environment.

Interested?

Please send a cover letter and resume to jobs@seattlebank.com.

Seattle Bank considers for employment and hire qualified candidates without regard to race, religious creed, religion, color, sex, sexual orientation, genetic information, gender, gender identity, gender expression, age, national origin, ancestry, citizenship, protected veteran or disability status or any factor prohibited by law, and as such affirms in policy and practice to support and promote the concept of equal employment opportunity and affirmative action, in accordance with all applicable federal, state, provincial and municipal laws. The company also prohibits discrimination on other bases such as medical condition, marital status or any other factor that is irrelevant to the performance of our teammates. Candidates must possess authorization to work in the United States, as it is not the practice of Seattle Bank to sponsor individuals for work visas. Employment at Seattle Bank is on an at-will basis.

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