



**JOB REF NO.** CITI-#21276808  
**JOB TITLE:** INTERNATIONAL PERSONAL BANKING (IPB) - ASSISTANT RELATIONSHIP MANAGER

## **JOB DESCRIPTION**

THIS JOB ROLE IS LISTED AS PART OF CITI'S #BACKTOWORK HIRING CAMPAIGN.

The Client Service Officer is a developing professional role. Applies specialty area knowledge in monitoring, assessing, analyzing and/or evaluating processes and data. Identifies policy gaps and formulates policies. Interprets data and makes recommendations. Researches and interprets factual information. Identifies inconsistencies in data or results, defines business issues and formulates recommendations on policies, procedures or practices. Integrates established disciplinary knowledge within own specialty area with basic understanding of related industry practices. Good understanding of how the team interacts with others in accomplishing the objectives of the area. Develops working knowledge of industry practices and standards. Limited but direct impact on the business through the quality of the tasks/services provided. Impact of the job holder is restricted to own team.

## **RESPONSIBILITIES**

- Deliver wealth management services to CITI PRIVATE BANK clients with guidance from the Banker teams.
- Manage and execute client transactions with respect to business and individual banking, credit and investment products. Ensure transactions are completed within audit and compliance standards as well as timely.
- Take ownership of client investigations (e.g., statement reporting issues and pricing inquiries) and collaborate with operational and middle office teams to ensure effective resolution.
- Coordinate account maintenance for all products and reporting on WINS including address changes, telephone number updates, account status changes, rates and fee waivers.
- Enforce banking policies and procedures to ensure operational integrity while maintaining high client satisfaction.
- Proactively arrange and participate in client visits and perform service quality check-in calls to clients.
- Obtain banker/client appointments to build upon existing or establish new relationships.
- Identify and document new business opportunities for referral to banker or product specialist.
- Perform responsibilities through proficient use Citi applications. Participate in service related process improvements.
- Appropriately assess risk when business decisions are made, demonstrating particular consideration for the firm's reputation and safeguarding Citigroup, its clients and assets, by driving compliance with applicable laws, rules and regulations, adhering to Policy, applying sound ethical judgment regarding personal behavior, conduct and business practices, and escalating, managing and reporting control issues with transparency.

## **EDUCATION & QUALIFICATIONS:**

- 2 to 3 years relevant experience
- Ability to multi-task with strong organizational and time management skills per the needs of banker teams and clients
- Ability to problem solve and analyze data with demonstration of attention to detail
- Strong verbal and written communication skills

- Client facing experience; strong background and interest in the fields of operations and compliance; previous sales referral experience Knowledge of investments, banking, and credit products
- US: Licenses: Series 7/63 or 7/66 or willing to acquire within 120 days
- Bachelor's/University degree or equivalent experience

*Citi is an equal opportunity and affirmative action employer.*

*Qualified applicants will receive consideration without regard to their race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or status as a protected veteran.*

**Application Deadline:** One month from job

**Remuneration Package:** to be discussed at interview stages

**Working Hours:** Mon - Fri 9am - 6pm

**Job Nature:** Full-time / Flexible Hours

**Application Process:**

1. Go to: <https://citi.wd5.myworkdayjobs.com/en-US/2>
2. Search for Job Reference Number '21276808'
3. Read the job specifications
4. Click 'Apply' and complete the application
5. Under the question 'How did you hear about us?', select 'Job Boards => Mums@Work'.