

Personal Banking Advisor

Our Massive Transformational Purpose

Unleash our unparalleled customer care for community good

Our Values

People first: We put you at the centre of everything we do

One team: We're stronger together

Innovation: We find a better way

Integrity: We do right by you

Keep it simple: We like things straight forward

Personal Banking Advisor

Working at TSB

Our people are proud to belong to a 100% independent NZ owned Bank and proud to see the results of their efforts invested back into New Zealand.

We're a leader in customer service, having won the 2019 Consumer NZ People's Choice Award for Banking four years in a row and the 2019 KPMG New Zealand Customer Experience Excellence Award.

Our focus to deliver good customer outcomes is in our people's DNA and TSB is so committed to it, it's a core part of our purpose: Unleash our unparalleled customer care for community good.

Our strong corporate values: One Team, People First, Integrity, Innovation, Keep it Simple set our standards and set us apart. We demonstrate our People First value through the distribution of our profit for the benefit of others and by providing our employees with a place to belong, grow, and be recognised.

We work together as a One Team community to ensure a sustainable future and we encourage every employee to have a voice and be an active participant in our success.

We aim to create remarkable experiences for our people just as our people create remarkable experiences for our customers.

Role dimensions

Reports to:	Principal Manager
Department:	Customer Solutions and Service
Job Family:	Branch Network
Direct Reports:	0
Total Employees:	0
Financial Authority:	No

Role requirements

Primary purpose

Personal Banking Advisor is the first point of contact for all new and existing customers with a strong focus on building and maintaining relationships. Deliver all customers with expectational service while being responsible for providing banking solutions and options to help customers achieve their financial goals. Ensure all recommendations provide customers with ease and convenience of banking with TSB.

Role specific areas of responsibility

Understanding customer needs

- Deliver meaningful quality conversations to help educate and engage with customers to identify suitable options that help them meet their financial goals
- This includes the fulfilment of banking products and providing digital solutions to give customers options to complete banking their way
- Complete accurate records of all customer interactions

Promote the Bank's Lending and Banking Services:

- To promote the Bank's full suite of lending and general banking services and work with Principal Manager to develop strategically important business or referral alliances.

Customer Excellence

- Create and develop long term relationships with customer's to accurately understand and support their financial needs at each stage
- Increase growth and manage retention of the branch's customer portfolio
- Work as One Team to achieve great Voice of Customer feedback
- Complete accurate records of all customer interactions

Operational Excellence

- Do it once and do it right
- Policy and procedure followed to ensure minimal error rates and operational losses.
- Take ownership to ensure our AML/CFT compliance expectations and requirements are achieved. Ensure that the Bank's Code of conduct is always adhered to.
- Ensure that the Bank's Code of conduct is always adhered to.
- Ensuring compliance with relevant legislative requirements including but not limited to, AML, FAR, Privacy Act, CCCFA, Property Law Act and the Code of Banking Practice etc; Identify and proactively report conduct, compliance, operational and credit risks, incidents and near misses.

Productivity and Sustainability

- Work effectively with others to achieve profit for purpose.
- Drive activities to deliver customer growth and retention.
- Proactively complete customer follow-up requests within service level agreements.
- All customer care call programs are actioned to build and maintain strong relationships.
- Identify and refer customer to specialist across the bank MMM and SME Lending.
- Contribute to the bank financial objectives.

Community Good

- Wear TSB with pride for our community
- Become a TSB ambassador and support community volunteering.

Business Development

- Do today, to enable tomorrow.
- Promote the Bank's full suite of lending and general banking services and work with Principal Manager to develop strategically important business or referral alliances.

Our People

- Strive for greatness for you and your team.
- You are accountable for your performance and take full advantage of the bank performance framework to assist your personal development

Generic responsibilities

- Keep up to date with and comply with all Bank policy and procedures.
- Comply with all health and safety policies, directions and instructions and ensure that in the performance of duties not to undermine own health and safety or the health and safety of any other person. Be continually mindful of the Bank's Health and Safety Policy:
 - No business objective will take priority over health and safety.
 - All incidents are preventable.
 - Whilst management have ultimate accountability, we all have responsibility for health, safety and wellness.
 - All employees have the responsibility to stop any job they believe is unsafe or cannot be continued in a safe manner.
- At all times demonstrate the Bank's values
- Embrace change and act as a change agent – accepting, embedding and reinforcing change in the workplace.

Person specification

Required experience & qualifications

- New Zealand Certificate in Financial Services Level 5
- Previous Banking experience desirable
- Proficient use of Microsoft word, Excel and Power point
- Preferable experience of 1+ years in a customer service role

From time to time there may be additional activity not contained within this position description that the appointee is to complete in the interests of the appointment and their own personal development.

This position description provides a broad overview of responsibilities. The position description is a living document and the Bank reserves the right to amend from time to time as required

