Role Description

Name	
Role	Private Client/real Estate Finance Sales Support
Reporting to	Sales Support Team Lead
Team	Private Client Lending Operations (PCLO)
Division	Group Lending Operations
Key relationships	Banking Teams, Operational Teams, Credit
Description of role and key responsibilities	The role involves assisting the Private Client & Real Estate distribution team(s), acting as a conduit between front line distribution (Bankers & Business Developers) and the support functions including other functions within Group Lending Operations, Banking Operations, On-boarding, Marketing, Compliance and other key business stakeholders. **Key Responsibilities Include:** • Maintaining client and product data. • Managing potential leads from Business Developers into the Banking team. • Supporting Bankers with the operational aspects of certain processes such as submission of deals to credit on lending transactions and data capture into client relationship systems. • Responding to client enquiries such as updates on applications, requests for statements & requests to service their accounts. • Participation in projects and small change where relevant.
Approved Person Status	Current / Intended / **Not applicable** (please circle) Customer CF30 □ Other □ (please specify) CF If CF 30, specify the underlying function (list here):
Core Skills and Knowledge	• Experience in a client facing environment, preferably in Banking. • Proven ability of problem solving, including the ability to proactively resolve client queries and complaints • Conscientiousness and attention to detail is essential • Ability to balance client experience against business and operational risk • Ability to manage multiple deals and tasks in tandem **Personal Attributes**

	• Excellent communication skills with the ability to influence stakeholders and manage expectations.
	• Good organisation and strong attention to detail.
	• Energetic and enthusiastic, a self-starter who is keen to work hard and help develop the business.
	• Passionate about providing extraordinary service to our clients.
	• Analytical mind set- ability to problem solve and take ownership of creating positive outcomes.
	• Love working as part of a wider team and interacting with a variety of stakeholders at all levels.
Any other attributes that would be helpful, but not essential for the role.	

We agree that this document accurately reflects the key responsibilities and associated skills, knowledge and attributes required for ………………………………………………… <insert name> to perform this role at this time. We acknowledge that it is our responsibility to update this profile as things change.

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Line Manager's signature   Date   Employee's signature   Date