



Girard is a full-service, wealth management firm backed by the strength and stability of Univest Financial – a trusted institution with a 143-year history. We provide independent advice and customized wealth solutions to individuals, businesses, and charitable institutions, to help meet their investing and financial planning goals. We are seeking for immediate hire a **Private Banking Relationship Manager** in the **Greater Philadelphia Area**.

Responsibilities Include:

Responsible for developing new prospects and obtaining new clients , promoting Wealth division products and services, and credit offerings for consumer lending, mortgages and secured lines.

Expected to build a trusted, competent, and confident relationship with clients by having the capability and authority to provide financial solutions for life.

Cross-sell other bank services by cooperating with other areas of the bank to enhance the overall marketing effort of the corporation.

Act as point person on new credit relationships and submit loan requests for underwriting and approval.

Be knowledgeable about a customer's business and plans for the future, as well as the customer's borrowing needs and ability to repay debt.

Establish and negotiate within loan policy and procedure the terms under which credit will be extended to qualified customers including interest rate, repayment method, and collateral requirements.

Increase visibility in the bank's sales and marketing area by participating in business, service and other non-profit community organizations.

Responsible for compliance with laws and regulations that apply to the position, including the Univest Code of Conduct

Perform additional duties as required.

Qualifications:

Goal-oriented individual with strong leadership and interpersonal and communications skills

Customer-focused individual with strong knowledge of credit, banking, and investment products and processes. 5-8 years' experience preferred.

Ability to cross-sell products, along with proven sales and product expertise with business clients.

Community involvement in geographic area is preferred.

Bachelor's degree in Finance or equivalent experience in related area desired.

Ability to handle most problems/exceptions in an independent manner.

PC experience, specifically in Microsoft Office Suite

Interested? Apply today by emailing your resume to HR@MeetGirard.com.

Equal Opportunity Employer/Minority/Female/Disability/Veteran