Position/Title: **Private Banking Relationship Manager**
Department: **014 - Administration**
Salary Grade: **17**
Schedule: **40 hours per week (Monday through Friday 8:30a – 5:00p)**

Under the direct supervision of the President of The Milford Bank, this role manages, maintains, and develops personal financial services and wealth management solutions for high-net-worth clients, providing tailored financial advice and investment strategies aligned with their goals.

This position requires a working knowledge of Bank products and services to deliver exceptional service, meet customer needs, and maintain customer files in accordance with established Bank policies and procedures, legal and regulatory requirements, and customer satisfaction standards.

Primary Responsibilities include:

- Single point of contact for clients, providing coordinated access to company's products and services.
- Build and maintain trusted client relationships through regular communication, personalized service, and networking to attract new clients and grow the portfolio.
- Develop, oversee, and monitor customized banking strategies, adjusting recommendations as needed based on market conditions and client objectives.
- Evaluate complex financial documents, assess risk, and develop strategic financial plans that support client needs and goals. Refer clients to appropriate experts in estate planning and tax optimization.
- Provide guidance on wealth management, risk management, and credit solutions.
- Ensure financial activities comply with internal policies, applicable laws and regulations, confidentiality requirements, and ethical standards.
- Stay informed of economic trends, financial products, and opportunities to provide timely, strategic advice.
- Prepare required materials in advance of independent audits and State and Federal examinations.
- Interact professionally with current and prospective customers to support relationship development and service delivery.
- Demonstrate knowledge of digital banking products, services, and customer support practices.
- Maintain the confidentiality of customer financial and personal information.

Other Responsibilities:

The responsibilities described above are intended to outline the general duties associated with this position. The Bank reserves the right to assign additional duties, whether related or unrelated to those listed, as business needs require.

Position Requirements:

- Bachelor's degree in finance, economics, business administration or equivalent experience.
- 3–5 years of private banking, wealth management, or related financial services experience.
- Ability to work independently, manage priorities, meet deadlines, exercise sound judgment, and analyze financial statements and related information.
- Strong written and interpersonal communication skills.
- Superior customer service skills.