



# Indigenous.Link

Canada's fastest growing Indigenous career portal, Careers.Indigenous.Link is pleased to introduce a new approach to job searching for Indigenous Job Seekers of Canada. Careers.Indigenous.Link brings simplicity, value, and functionality to the world of Canadian online job boards.

Through our partnership with Indigenous.Links Diversity Recruitment Program, we post jobs for Canada's largest corporations and government departments. With our vertical job search engine technology, Indigenous Job Seekers can search thousands of Indigenous-specific jobs in just about every industry, city, province and postal code.

Careers.Indigenous.Link offers the hottest job listings from some of the nation's top employers, and we will continue to add services and enhance functionality ensuring a more effective job search. For example, during a search, job seekers have the ability to roll over any job listing and read a brief description of the position to determine if the job is exactly what they're searching for. This practical feature allows job seekers to only research jobs relevant to their search. By including elements like this, Careers.Indigenous.Link can help reduce the time it takes to find and apply for the best, available jobs.

The team behind Indigenous.Link is dedicated to connecting Indigenous Peoples of Canada with great jobs along with the most time and cost-effective, career-advancing resources. It is our mission to develop and maintain a website where people can go to work!

Contact us to find out more about how to become a Site Sponsor.

Corporate Headquarters:  
Toll Free Phone: (866) 225-9067  
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# Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/05/07

## Personal Banker-1900011038

<b>Job ID</b>	<b>0A-41-6D-BF-71-C9</b>	
<b>Web Address</b>	<a href="https://careers.indigenous.link/viewjob?jobname=0A-41-6D-BF-71-C9">https://careers.indigenous.link/viewjob?jobname=0A-41-6D-BF-71-C9</a>	
<b>Company</b>	BMO Financial Group	
<b>Location</b>	Courtenay, British Columbia	
<b>Date Posted</b>	From: 2019-05-17	To: 2019-06-16
<b>Job</b>	Type: Full-time	Category: Finance
<b>Languages</b>	See Job Description	

### Description

You have a passion for helping others and growing BMO's business. As a Personal Banker, you will focus on delivering exceptional service by truly understanding personal and small business customers and conducting a thorough financial needs assessment to offer the most appropriate solution that fulfills the customer's immediate and future financial needs. You will identify and refer more complex financial needs to the appropriate branch team member.

- Be a key member of a collaborative and versatile branch & market team
- Engage customers in complete, needs based conversations to identify financial solutions and preferred banking channels while recommending tailored solutions addressing both sales & service needs, including everyday banking, retail investments, lending solutions, home financing (including business-for-self applications) and small business solutions
- Offer advice and guidance on the digital and self-serve options available with the goal of making banking easy, simple and fast
- Support customer transaction based needs as required based on customer traffic
- Take the initiative and find creative approaches to make each customer's experience feel personal
- Proactively engage customers by reaching out, generating appointments and building new relationships within the community to grow BMO's business
- Take a lead in proactively engaging with existing customers and prospects by providing needs-based assessments to grow loyalty and identify immediate/future opportunities
- Collaborate with your BMO partners and identify referral opportunities to further grow the customer's relationship with BMO beyond personal banking
- Keep current with BMO policies and processes, the wider financial services marketplace, the legal and regulatory environment, and our commitment to upholding the highest ethical requirements of our industry
- Follow through on the risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, act in their best interests, and ensure an effectively run branch
- Address questions & resolve issues raised through Consumer Credit, audits and quality checks to ensure data entry and recommendations are accurately documented in the lending applications and the lending process is followed
- Use the Our Approach to Risk Management framework to protect the Bank's assets and maintain the quality of the lending portfolio by ensuring adherence to lending process requirements and established yield, quality, diversification and risk guidelines.
- Make credit recommendations for personal lending transactions, including home financing, in accordance with sound credit granting principles and with the Bank's Policies and Procedures

### Qualifications

What we're looking for:

- Passionate commitment to helping our customers
- Experience in a consultative customer service or sales role, with a drive to deliver a personal customer experience
- A focus on results and the ability to thrive in a consultative sales and team-based environment
- Resourceful self-starter with courage and confidence to approach customers
- Skilled at personal account opening, Customer Welcome Offers and investment discussions
- Digitally-savvy and able to identify banking alternatives for our customers
- Strong interpersonal skills, including the ability to build rapport and connections with customers
- An aptitude for listening, solving problems, and responding flexibly and creatively to new challenges

### Customer Focus

• Spends 90% of time on advice-based conversations with customers and proactively booking appointments Spends 10% of time on conversations and requests related to banking services, including handling transactions and supporting customers who walk into the branch

### Skills:

- Projects a professional presence; proactively engages customers in complete conversations about their personal banking needs; listens actively to understand customer needs, clearly explains potential solutions and their benefit to the customer
- Learns quickly and is motivated to apply new knowledge
- Is collaborative, enjoys helping others and being part of a team
- Identifies opportunities for referrals and makes smooth hand offs to partners in BMO FG

### Knowledge:

- Undergraduate degree and/or equivalent work experience
- Working knowledge of personal and small business customer needs and solutions

• Working knowledge of retail investments and lending product

• Experience in financial services is an asset

#### Digital Leadership

• Confident and at ease in the use of social media, tablets, Smart phones, online tools, and applications

• Highly skilled at helping people who don't find digital applications intuitive to gain confidence in how to use them and understand their benefits

#### Investments

• Registered Investment Sales Representative (RISR), including Mutual Funds Advanced completed

#### Lending

Personal Lending Credit Qualified Working without limits, with Business For Self designation; working knowledge of creditor insurance

At BMO we have a shared purpose; we put the customer at the centre of everything we do – helping people is in our DNA. For 200 years we have thought about the future – the future of our customers, our communities and our people. We help our customers and our communities by working together, innovating and pushing boundaries to bring them our very best every day. Together we're changing the way people think about a bank. As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset.

To find out more visit us at <https://bmocareers.com>.

#### How to Apply

To submit your application for this job, please go to:

[https://bmo.taleo.net/careersection/2/jobdetail.ftl?job=1900011038&lang=en\\_GB](https://bmo.taleo.net/careersection/2/jobdetail.ftl?job=1900011038&lang=en_GB)

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process.