



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.

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Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/05/05

Client Service Associate

Job ID 149067-en_US-2967
Web Address
https://careers.indigenous.link/viewjob?jobname=149067-en_US-2967
Company Scotiabank
Location Barrie, ON
Date Posted From: 2022-05-16 To: 2050-01-01
Job Type: Full-time Category: Finance

Description

Requisition ID: 149067

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture. Client Service Associate, Commercial Banking - Barrie, Ontario

Job Purpose:

This role contributes to the overall success of the Commercial Bank in Canada, ensuring specific individual goals, plans, initiatives are executed / delivered in support of the team's business strategies and objectives while also ensuring all activities are conducted in compliance with governing regulations, internal policies and procedures.

The Client Service Associate (CSA) provides the Relationship Managers with support needed to service client requirements and new asks. This will include coordinating efforts with internal partners and directly reaching out to clients to address various activities such as resolution of escalated client challenges, collection/processing of financial reporting, satisfaction of funding requirements and onboarding needs. The role is specific to servicing of the Business Banking in Commercial Banking Distribution.

This role will work from the Scotiabank Barrie office. Key Accountabilities: Champions a customer focused culture to deepen client relationships and leverage broader Bank relationships, systems and knowledge.

Working closely with (Sr) Client Relationship Managers, the CSA is responsible for providing the following services to a portfolio of existing and prospective clients:

- o Onboarding: Supporting the collection of information directly from clients and from various sources necessary to assess the client's risk profile in order to ensure the Bank meets its regulatory requirements related to KYC, AML, etc. This includes contacting clients, sourcing internal/external sources/web sites, documenting information in Know Your Client documentation in various formats such as the Client Profile Information documents and responding to various internal Compliance groups.
- o Client servicing escalations: Help resolve service related matters raised by the client directly to the (Sr) Client Relationship Manager. This responsibility does not replace the servicing provided through the Business Service Center and is typically credit in nature or day to day servicing.

o Credit related tasks: (a) Contact clients for financial reporting and spread Financial Statements, Projections and Borrowing bases, review results, escalate any signs of deterioration and update appropriate systems; (b) commence preparation of Credit Presentations; (c) assist with completion of conditions precedent, diligence and any other requirements necessary to obtain approvals (d) ensure client files are complete and appropriately documented in various systems (eg. SDR, e-tracker etc.) and (e) general support as necessary in the annual review process and other credit related situations needed to maintain portfolio quality.

o Fulfilment: Coordinating efforts with the client and various internal partners (eg. BSC, EDDU, CRA, GBM) to ensure loan funding and business account openings are fulfilled as per customer expectations.• Provide status information on the progress of various fulfilment, KYC, AML onboarding and service requests and ensure bottlenecks or delays are promptly escalated with a plan to resolve

• Look for opportunities to make suggestions to continually improve processes and client satisfaction metrics. This may include actioning feedback received directly from clients or through client satisfaction vehicles such as the Pulse

• Understand how the Bank’s risk appetite and risk culture should be considered in day-to-day activities and decisions.

• Actively pursues effective and efficient operations of his/her respective areas, while ensuring the adequacy, adherence to and effectiveness of day-to-day business controls to meet obligations with respect to operational risk, regulatory compliance risk, AML/ATF risk and conduct risk, including but not limited to responsibilities under the Operational Risk Management Framework, Regulatory Compliance Risk Management Framework, AML/ATF Global Handbook and the Guidelines for Business Conduct.• Champions a high performance environment and implements a people strategy that attracts, retains, develops and motivates their team by fostering an inclusive work environment; communicating vision/values/business strategy and managing succession and development planning for the team

Functional Competencies:

• Strong commitment to excellent client service and ability to work with clients to resolve issues in an amicable and prompt manner

• Strong organizational skills to co-ordinate and prioritize a number of concurrent requests from different Relationship Managers

• Strong interpersonal skills to obtain agreements within Commercial Banking and partners

• Strong written and verbal skills with proven ability to engage stakeholders and clients

• Strong knowledge of Onboarding, Know Your Customer, Anti Money Laundering processes

• Good knowledge of Financial Statements and Credit Analysis

• Good knowledge of Credit Structures and applicable Risk Management

• Good knowledge of fulfilment processes and roles of partners

• Good knowledge of Commercial Banking partners and their involvement in servicing clients. In particular knowledge of the Business Service Center, Enhanced Due Diligence Team and Cash Management teams is important

• Good knowledge of the Commercial Banking Distribution structure as well as role of other groups within Commercial Banking (Roynat, Real Estate, Leasing etc)

• Thorough knowledge of the applicable software and technology platforms for Commercial (e.g., Sales Force, Intralink, Lotus Notes)

- Good knowledge of Microsoft Office applications
- A high degree of flexibility to adapt to a wide variety of tasks
- Strong commitment to accuracy, customer focus and results focus

Education/Work Experience:

- Commercial Banking Experience strongly preferred - College/University degree or equivalent work experience
 - Commitment to participate in other training requirements as determined by the Bank from time to time
 - Working knowledge of the features and benefits of Commercial products and services
- #CB-INLocation(s): Canada : Ontario : Barrie

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please click [here](#). Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview will be contacted.

For more information, visit [Scotiabank for Client Service Associate](#)