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# Personal Banking Associate

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Application Deadline:

05/31/2024

Address:

737 Golf Links Road, Unit 5

Job Family Group:

Retail Banking Sales & Service

Delivers exceptional service to BMO customers and prospects. Identifies customer needs and provides advice and guidance regarding financial services in the best interests of customers. Works collaboratively within the branch and with BMO partners to deliver the desired customer experience and business objectives.

- Identifies customer needs and initiates referrals to BMO colleagues.
- Supports customer requests for banking services, including handling transactions and supporting customers who walk into the branch.
- Welcomes customers warmly and meets their banking service and transactional needs with seamless execution.
- Offers advice and guidance on available digital and self-serve options with the goal of making it easy, simple, and fast to bank with BMO.
- Reviews customer profiles and engages customers in a needs-based conversation to identify potential opportunities and address everyday banking and credit card needs.
- Contributes to meeting branch business results and the customer experience.
- Supports operational activities (e.g. inventory management, escalated service requests, following up on customer applications, filing, opening and closing branches, etc.)
- Manages, loads, and reconciles cash transactions between treasury and various branch units (e.g. CRU).
- Executes routine tasks (e.g. service requests, transactions, queries, etc.) within relevant service level agreements.
- Acts as a key member of a collaborative and versatile branch and market team.
- Probes to understand customer personal banking and credit card needs and integrates marketing promotions and programs into customer conversations to provide strategic advice.
- Organizes work information to ensure accuracy and completeness.
- Takes the initiative to find creative approaches that make each customer's experience feel personal.
- Looks for ways to contribute to the ongoing improvement of the overall branch customer experience.
- Contributes to business results and the overall experience delivered in the branch.
- May work at multiple branches based on market needs; work schedule may differ from week to week in terms of days worked, hours, and shifts.
- Follows through on risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, and act in their best interest.

- Keeps current with the wider financial services marketplace, the legal and regulatory environment, and our commitment to uphold the highest e requirements of our industry.
- Maintains current knowledge of personal banking products, practices, and trends and integrates into customer conversations.
- Identifies and reports suspicious patterns of activity that are suspected to be related to money laundering.
- Complies with legal and regulatory requirements for the jurisdiction.
- Protects the Bank's assets in compliance with all regulatory, legal, and ethical requirements.
- Completes standardized tasks under supervision.
- Performs initial problem solving within given rules/limits & escalates when required.
- Broader work or accountabilities may be assigned as needed.

**Qualifications:**

- No prior experience necessary; post-secondary degree or certification in related field of study is desirable.
- High-level knowledge of personal, commercial and partner offers, and how each can best serve customers' individual needs.
- Confident and experienced 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 to understand their benef
- Projects a professional presence.
- Basic knowledge of specialized sales and business banking solutions to refer to specialists.
- Passionate commitment to helping customers.
- A focus on delivering a personal experience to customers.
- Resourceful self-starter with courage and confidence to approach customers.
- Readiness to collaborate and work in different capacities as part of a team.
- 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.
- Basic knowledge learned on the job.
- Verbal & written communication skills - Basic (in business environment).
- Organization skills - Basic (in business environment).
- Collaboration & team skills - Basic (in business environment).

**Compensation and Benefits:**

\$35,000.00 - \$52,000.00

**Pay Type:**

Salaried

The above represents BMO Financial Group's pay range and type.

Salaries will vary based on factors such as location, skills, experience, education, and qualifications for the role, and may include a commission st  
Salaries for part-time roles will be pro-rated based on number of hours regularly worked. For commission roles, the salary listed above represents  
Group's expected target for the first year in this position.

BMO Financial Group's total compensation package will vary based on the pay type of the position and may include performance-based incentives  
bonuses, as well as other perks and rewards. BMO also offers health insurance, tuition reimbursement, accident and life insurance, and retiremen  
To view more details of our benefits, please visit: <https://jobs.bmo.com/global/en/total-rewards> (<https://jobs.bmo.com/global/en/total-rewards>)

**We're here to help**

At BMO we are driven by a shared Purpose: **Boldly Grow the Good in business and life.** It calls on us to create lasting, positive change for our custo  
communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic g  
the world.

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 r  
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  
reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience  
your skillset.

To find out more visit us at <https://jobs.bmo.com/ca/en> (<https://jobs.bmo.com/ca/en>).

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