



**JOB REF NO.** CITI-01  
**JOB TITLE:** GLOBAL CONSUMER GROUP (GCG)  
– CITIGOLD RELATIONSHIP MANAGER

### **JOB DESCRIPTION**

The CitiGold Relationship Banker is a trainee professional role. Requires a good knowledge of the range of processes, procedures and systems to be used in carrying out assigned tasks and a basic understanding of the underlying concepts and principles upon which the job is based. Good understanding of how the team interacts with others in accomplishing the objectives of the area. Makes evaluative judgements based on the analysis of factual information. They are expected to resolve problems by identifying and selecting solutions through the application of acquired technical experience and will be guided by precedents. Must be able to exchange information in a concise and logical way as well as be sensitive to audience diversity. Limited but direct impact on the business through the quality of the tasks/services provided. Impact of the job holder is restricted to own job.

### **RESPONSIBILITIES:**

- Client Account Management
- Review CG customer needs and asset allocation, pro-actively engage with the customer to validate the understanding of the needs.
- Advise CG customers to enrich the relationships by mobilizing additional funds and sell other fee based products/services based on the current and future customer needs.
- Review product penetration for the assigned client base, identify potential CG customers who can be sold tailored products to enhance product penetration
- Ensure coverage of all relationships through customer engagements, risk profiling and financial planning.
- Organize CG customer events to enhance customer bonding.
- Acquire new CitiGold customers through converting referral leads.
- Compliance, Risk & Controls
- Ensure that KYC/AML and other compliance norms are strictly adhered to.
- Appropriately assess risk when business decisions are made, demonstrating particular consideration for the firm's reputation and safeguarding Citigroup, its clients and assets, by driving compliance with applicable laws, rules and regulations, adhering to Policy, applying sound ethical judgment regarding personal behavior, conduct and business practices, and escalating, managing and reporting control issues with transparency.

### **EDUCATION & QUALIFICATIONS:**

- High School diploma or equivalent
- Previous relevant experience preferred
- \*Ability to manage relationships both internal and external; Ability to multi-task
- \*Mandatory certifications as required for selling financial products

*Citi is an equal opportunity and affirmative action employer.*

*Qualified applicants will receive consideration without regard to their race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or status as a protected veteran.*