



JOB REF NO. CITI-02

JOB TITLE: CITI PRIVATE CLIENT (CPC) RELATIONSHIP MANAGER

JOB DESCRIPTION

The CPC Relationship Manager is a seasoned professional role. Applies in-depth disciplinary knowledge, contributing to the development of new techniques and the improvement of processes and work-flow for the area or function. Integrates subject matter and industry expertise within a defined area. Requires in-depth understanding of how areas collectively integrate within the sub-function as well as coordinate and contribute to the objectives of the function and overall business. Evaluates moderately complex and variable issues with substantial potential impact, where development of an approach/taking of an action involves weighing various alternatives and balancing potentially conflicting situations using multiple sources of information. Requires good analytical skills in order to filter, prioritize and validate potentially complex and dynamic material from multiple sources. Strong communication and diplomacy skills are required. Regularly assumes informal/formal leadership role within teams. Involved in coaching and training of new recruits Significant impact in terms of project size, geography, etc. by influencing decisions through advice, counsel and/or facilitating services to others in area of specialization. Work and performance of all teams in the area are directly affected by the performance of the individual.

RESPONSIBILITIES:

- Client Account Management
- Review CPC customer needs and asset allocation, pro-actively engage with the customer to validate the understanding of the needs.
- Advise CPC 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 CPC 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 CPC customer events to enhance customer bonding.
- Acquire new CPC 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:

- Bachelor's/University degree or equivalent experience
- 5-8 years of experience

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.