

Financial Sales Advisor

Description: MISSION: Market retail banking products and services to mass market customers in order to grow, retain and maximize profit for the bank. Offer banking solutions to customers after capturing the customer profile conversation on CMS. Utilize CMS for leads to maximize new and existing deposit relationships through cross-selling of all retail banking products. Deliver an exceptional customer service experience while responding to daily customer inquiries.

RESPONSIBILITIES: Responsible for new account openings, cross-selling of all bank products, and exceptional customer service. Achieve sales goals established by manager through direct selling and referral of deposit, loan and investment products and services. Maximize the sale of retail products to all customers not in a portfolio. Strengthen customer relationships through cross-selling and up-selling to maximize retention and income generation by contacting existing and prospective customers. Responsible for all aspects of consumer direct and home equity related products, to include detailed benefit description, application acceptance and processing, as well as closing. Ensure all account and loan documentation meets consumer and business lending regulations, laws and policies. Demonstrate commitment and dedication by encouraging the support of the entire team toward the attainment of branch goals. Assist customers with all service inquiries.

Requirements:

Bachelors degree in Business, Finance or equivalent professional experience. Two years of proactive sales experience preferred. Health and Life insurance and prior investment sales experience preferred. Excellent oral and written skills. Must exhibit a very friendly and helpful attitude along with the ability to interact positively with customers and co-workers. Demonstrate ability to identify customer needs and implement an effective solution in a rapid growth environment. Must be able to meet deadlines and pressure to attain banking center sales while delivering an excellent customer experience. PC and calculator skills. Must have assertive communication skills along with a focus for sales.

To apply or for more information on this job, please visit our website at www.bbvacompass.com/careers for a complete list of open positions in your community. Should you have any questions or need additional information please feel free to contact Joe Perez at either joe.perez@bbvacompass.com or 972-705-4215

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