Relationship Advisor

SVB Financial Group overview:

SVB Financial Group provides diversified financial services to emerging, growth and established technology companies and the life science, venture capital/private equity and premium wine markets. Through its focus on these specialized markets and its extensive knowledge of the people and business issues driving them, SVB Financial Group provides a level of service and partnership that measurably impacts its clients' success.

SVBFG has approximately 1,300 employees, $11 billion in assets, and 32 offices serving entrepreneurs around the world – 27 in the United States, and five outside the United States (in London, U.K.; Herzliya, Israel; Mumbai and Bangalore, India; and Shanghai, China).

SVB has built a culture based on four core values: being enterprising, ethical, driven and dedicated. Both internally and with our clients, we value professionalism and emphasize its importance in communication, responsiveness, approach and appearance.

Job Description:

Relationship Advisor is responsible for:

- Support aligned Relationship Advisor Supervisor on service projects, CIF set up and account opening.
- Work in direct partnership with assigned lending team to deepen relationships with portfolio clients.
- Ability to proactively identify cross-selling opportunities based on client need and life stage.
- Able to assess client service situations, direct solutions and provide a high level of proactive follow-up to clients.
- Provide this client segment a highly personalized level of client service and product solutions or support.
- Must possess or have the ability to quickly build a base understanding of the bank's products and services.
- Ability to articulate and able to discuss the bank's primary products and services comfortably with the clients.
- Strong client interaction is required, both on the phone and in person.
- Handles all types of client issues and follows them through to their resolution with the appropriate areas within the bank.

Skills & Requirements:

- Demonstrate proficiency providing technical support to clients over the phone and in person.
- Working knowledge in the following modules: account reporting, wires, internal transfer, stop payments, foreign exchange and ACH.
- Knowledge of Cash Management Products and Services such as; Lockbox, Control Disbursements and Positive Pay.
- Knowledge of business credit card and International products and services.
- Typically requires a minimum of 3 years of related professional experience or 6+ years of overall experience.
- Series 6 not required.
- Bachelor degree or equivalent experience.