专业分类 ：公司业务部

客户经理

职责：

配合香港分行业务发展策略和目标，开发新客户及服务现有的公司客户。协助团队主管完成所有工作，包括有效推行并完成所有业务指标；开发优质新客户；执行境内外分行的业务联动；就其负责的客户，牵头、策划、分析、制定和实施最有利及可行的业务营销和客户管理策略；跟踪贷后风险；协助分行各类产品的创新及优化工作。

要求：
- 大学本科毕业或以上学历
- 最少 5 年相关工作经验
- 良好的市场开拓、营销和执行能力；熟悉市场以及公司客户业务和产品的处理流程
- 良好的业务统筹和组织能力；良好的客户营销和沟通谈判技巧；良好的信贷风险分析、判断及追踪能力
- 诚实和可信赖的工作态度，处事认真
- 熟练运用 MS Word、Excel、PowerPoint 等办公软件
- 良好的中英文表达和书写能力；掌握流利的普通话
- 有香港证监会 1 号和 4 号牌照资格者将优先考虑

Relationship Manager (Corporate Banking Department)

Responsibilities:

- Work closely with the Team Head in the Corporate Banking China Corporates team to manage and develop business for the targeted customers
- Prepare high quality business credit applications to ensure a smooth transaction approval process
- Lead business meetings and communicate with clients to solve enquiries on an ad-hoc basis
- Conduct in-depth financial and credit assessment and work within the credit policy and parameters of the bank
- Achieve the budgeted revenue targets of the team

Requirements:

- University graduate or above
- At least 5 years of solid experience in client relationship management in Mainland China
- Able to communicate well with clients and business parties of the Mainland China
- Strong inter-personal skills to manage a good relationship with clients and peers
- Excellent command of written and spoken English and Chinese (including fluent Putonghua)
- Proficiency in MS Word, Excel and PowerPoint
- Qualification of SFC license 1 and 4 will be preferred

专业分类 ：公司业务部

客户服务主任

职责：

为客户提供高效的全方位高质量服务； 处理客户开户和存款手续、处理客户查询以及 KYC (Know Your Customer) 程序；根據监管要求下进行定期 KYC 审查；支持客户经理的日常销售及数据报告工作；为部门提供行政支持。

要求：

- 中学毕业或以上学历
- 最少 2-3 年 KYC 审查的实际经验
- 熟悉香港金管局或相关监管机构对新客户 KYC 及反洗钱的要求；熟悉客户尽职调查的文件标准及要求
- 良好的中英文表达和书写能力；掌握流利的普通话
- 良好沟通能力、团队合作精神；能独立完成任务，注重细节
- 熟练运用 MS Word、Excel、PowerPoint 等办公软件
- 有香港证监会 1 号和 4 号牌照资格者将优先考虑

Client Service Officer (Corporate Banking Department)

Responsibilities:

- Deliver prompt and quality customer support services to clients and ensure smooth client onboarding and after-sale support experience
- Responsible for account opening including KYC, customer enquiries
- Perform document checking for the periodic KYC review on existing customers based on the latest HKMA requirements, and handle other related ad hoc tasks and assignments
- Update KYC Information System and follow up, monitor and report the overall progress of KYC review
- Support Relationship Managers on daily sales activities and statistical reporting
- Provide administrative and clerical support to department

Requirements:

- Secondary education or above
- At least 2-3 years hands-on experience in KYC document checking
- Knowledge of HKMA or relevant regulatory KYC/AML requirements for on-boarding new customer and knowledge of Customer Due Diligence documentation standard and requirement
- Excellent command of written and spoken English and Chinese (including fluent Putonghua)
- A good team player and independent, detail-minded with good communication skills
- Proficiency in MS Word, Excel and PowerPoint
- Qualification of SFC license 1 and 4 will be preferred

专业分类 ：私人银行中心

客户经理

职责：

配合分行业务推动计划，协助上级开展各项业务，制订个人的市场目标和业务开拓计划，发掘优质客户，重点向客户推介和争取业务；主动巩固客户群，建立稳固而广泛的客户网络，同时争取新户及潜质户，以拓展私人银行客户的业务；关注投资市场最新发展情况，及时向客户提供市场信息和合适产品；进行市场调查，了解可能对银行经营有影响的经济或政策情况，并妥善执行应对行动。

要求：

- 大学本科毕业或以上学历
- 最少 5 年财富管理/私人银行业务相关工作经验，深入了解各类投资产品交易操作流程
- 良好的市场开拓、营销和执行能力；良好的客户沟通和交际表达技巧
- 具备一定的分析能力，能客观地分析，提出自己的意见
- 熟练运用 MS Word、Excel、PowerPoint 等办公软件
- 良好的中英文表达和书写能力；掌握流利的普通话
- 有香港证监会 1 号和 4 号牌照资格者将优先考虑

Relationship Manager (Private Banking Centre)

Responsibilities

- Drive and develop new accounts by proactively engaging with both internal and external business partners
- Source private banking prospects, use networking skills to systematically acquire new clients, actively get involved in identifying and developing new business, capitalize business opportunities such as new policies issued by central government, and timely advising the Branch in adjusting the business direction to capture the business opportunities
- Create added value for both private banking clients and the Bank thru actively identifying the clients' needs, wants and preferences so as to create a long-term trusting relationship which is indispensable to our clients
- Achieve agreed business targets and complete assigned tasks within specified time frames
- Work on ad hoc projects and tasks assigned by management from time to time

Requirements

- University graduate, with at least 5 years of relevant experience in private banking and/or wealth management business
- Solid experience in client relationship management in both Mainland China and Hong Kong
- Qualified and experienced under SFO to carry out Type 1 & 4 Regulated Activities
- Able to communicate well with clients and business parties of the Mainland China
- Strong inter-personal skills to manage a good relationship with clients and peers
- Excellent command of written and spoken English and Chinese (including fluent Putonghua)