

**April 2018**

**Job Title:** Private Bank Client Services Support Representative  
**Department:** Operations, Client Services Support  
**Location:** Pittsburgh, PA

**Job Summary:**

The Client Services Support Representative coordinates the end to end Private Banking loan and deposit account opening process including assisting in gathering client data, preparing applications, completing due diligence, preparing the file for underwriting, creating documentation, engaging outside council, gathering all executed documents to open the account, preparing funding requests, following up on post-closing requirements, clearing exceptions, setting up accounts to the system and processing ongoing servicing requests. This position supports the Private Bankers and works closely with contacts at partner firms and also interface directly with our clients to address inquiries and process collateral releases. This position requires quick turnarounds to satisfy client requests. This job involves working closely with relationship managers, inside sales, portfolio managers, internal and external counsel, compliance, borrowers and all other authorized parties affiliated with each transaction. Performs other related duties, such as mailings and filing as assigned or required.

**Minimum Job Requirements:**

- High School diploma or equivalent, Associate's Degree preferred
- A minimum 4 years experience, including 2 years of bank operations processing, loan closings, customer service or related experience.
- Demonstrated knowledge of loan documentation and lending regulations and ability to effectively interface with customers, account managers, legal/compliance/credit and external contacts.
- Demonstrated knowledge of Deposit products including Checking, Money Markets and Certificates of Deposits.
- Ability to communicate effectively in writing and over the phone to quickly resolve customer requests.
- Job may require additional hours of work during peak periods to meet service levels.

**Preferred Job Requirements:**

- Able to work from 9 AM - 6 PM

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