



Job Title: Relationship Manager - Private Banking Lending
Department: Private Bank
Location: California

Summary of the Position:

The Relationship Manager - Private Bank Lending will call on their assigned target market to establish lending relationships with those firms' high net worth clients. Note that deposit or investment products or services will not be part of the position's responsibility. The position reports directly to the National Sales Director of Private Bank Lending and will be based out of the assigned territory that the Relationship Manager covers. The Position will require travel as necessary (on average, 2-3 days a week).

Primary Functions of the Position:

- Work with the President of Private Banking, National Sales Director, Key Accounts Management, Private Bankers, and the Inside Sales Team to identify target offices and firms.
- Sales metrics include making a minimum number of phone and in person calls to new advisors as well as to advisors with existing TriState Capital Bank relationships.
- Grow the loan portfolio by \$100 MM plus annually, produce a minimum amount of Gross loan fundings annually, and produce a minimum number of new loans applications annually.
- Develop new business by identifying and contacting existing or prospective Financial Advisors and Financial Advisory Firms to promote the bank's lending services, Access TSC.
- Use the Bank's CRM and marketing plans to maximize territory coverage and informational management reporting.
- Work closely with Inside Sales Team to deliver the Bank's lending programs to new and existing clients.
- Interface and coordinate efforts within the targeted offices and firms, FA's and clients when applicable.

Education and Experience Requirements:

- Bachelor's Degree required
- Minimum of 2 years of financial services experience required; experience within private banking or brokerage industry preferred.

Essential Skills and Abilities:

- Experience in building and developing relationships and working the designated territory
- Excellent verbal and communication skills
- Excellent organization skills, attention to detail and the ability to work independently in a fast-paced environment with minimal direction
- Well-developed customer relationship skills

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