



Job Title: Client Services Associate - Private Bank
Department: Private Bank Service Team
Location: Pittsburgh, PA

Summary of the Position:

The Client Services Associate participates in the end-to-end Private Banking loan servicing process and provides exemplary service and support to our clients. Incumbents may be required to focus on a specific functional area of the Private Bank Service Team, such as supporting client loan servicing requests, assisting PBST members with daily tasks, and participating in special projects as requested. This position must partner effectively with the full Sales organization, Portfolio Management, Internal and External Counsel, Compliance, Financial Advisors, and all other authorized parties affiliated with each Private Banking transaction in order to deliver a premier client experience across all client engagements.

Primary Functions of the Position:

- Works closely with all members of the Private Bank Service Team in supporting client requests
- Partners effectively with relationship managers, inside sales representatives, portfolio managers, internal and external counsel, compliance, borrowers, and all other authorized parties affiliated with each transaction
- Provides a premier client experience across all client engagements
- Works closely with other teams within operations and throughout the bank to enhance customer experience
- Participates effectively in assigned projects

Education and Experience Requirements:

- Bachelor's Degree, or equivalent combination of education and experience
- Minimum 1 year of financial industry experience preferred

Essential Skills and Abilities:

- Ability to organize and prioritize work assignments in a consistent manner to ensure timely and efficient execution
- Exceptional interpersonal and communication skills
- Proficiency in Microsoft Office preferred
- Keen attention to detail and understanding Private Bank processes and platforms
- Analytical problem-solving capabilities
- Strong work ethic and ability to be self-directed
- Ability to work effectively in a high-energy, fast-paced, team-oriented work environment and adapt quickly to changing priorities

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