



DE ADMINISTRACIÓN DE EMPRESAS



OPORTUNIDAD DE EMPLEO

Oriental

Company Name or LOGO: Oriental Bank

Job Title: **Retail & Brokerage Trainee**

Job Description or Minimum Requirements:

MAJOR DUTIES & RESPONSIBILITIES:

- Support the implementation of the Retail Channel Strategy for the assigned OFG branch.
- Sells the organization's products: Banking, Brokerage Investments and Insurance units for which the incumbent is licensed, such as: stocks, Bonds, Unit Investment Trusts, Mutual Funds, Annuities, etc.
- Work with Branch Manager and branch peers to expand business sales.
- Identifies internal and external prospects to be referred to: Mortgage Executives, Relationship Manager, and Bank Product Officers (BPO's).
- Acquire new customers: Responsible for identifying potential new clients and working with them to build up a relationship
- Advice and Consult with Clients: Work with their clients and analyze their financial information to determine strategies and services to help meet their financial needs and goals, such saving for college, buying a home and planning for retirement.
- Coordinates and promotes the sale of products and services through the use of diverse marketing activities, like: telemarketing drives, mailing campaigns, implementing seminars within the Retail Channel branch and at diverse external sites, participates in conventions.
- Meets sales and profitability goals set for each product and service.
- Collaborates with the quality client service efforts.
- Assures compliance with the requirements of the: Federal and local laws and regulations: Americans Disability Act, Equal Employment Opportunity, Truth in Lending, Truth in Savings, Community Reinvestment Act, Banking Privacy Act, Bank Secrecy Act, RESPA – HMDA – ECOA regulations, NASD and SEC rules and regulations, Financial Institutions and Insurance Commissioners' regulations, etc.

EDUCATION AND EXPERIENCE:

- College degree program in any area of study, preferably in Business or Finance.

Programa ENLACE

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- Agrees to pass FINRA securities Series 7 license and Life Insurance and Annuities licenses. Will be required to attain them during the first 4 months of employment for Series 7 license and 6 months for Insurance licenses.
- Well organized, customer-service oriented, results-driven, highly motivated, self-starter who possesses integrity, a strong work ethic and the desire to help others plan for and protect their financial futures.
- Team player who possesses excellent interpersonal skills and communication abilities, with a high degree of self-confidence.
- Ability to meet deadlines and manage expectations.
- Computer skills in the use of Word, Excel, Power Point, Outlook, Internet Tools and other operative programs.

Opportunity Date (Month/Day/Year): 12/18/2017

Application Deadline: 01/31/2018

Type of Position: Full-Time

Number of Weekly Hours: 40

Compensation: Pay

Area of Specialization:

Location: Metro Region

Contact Person & Job Position: Ivelisse Garcia, Talent Acquisition Specialist

E-mail of Contact Person: igarcia@orientalbank.com

E-mail to send resume or application URL: igarcia@orientalbank.com

Phone Number:

Posting Date:

Please include in the subject of the email "Referred by Programa ENLACE UPR-RRRP"

