

# Job overview

## Personal Banker 2

### Our vision:

“We want to satisfy our customers’ financial needs and help them succeed financially.”

- *The Vision and Values of Wells Fargo*

## What a Personal Banker 2 does

Personal Banker 2s (PB2s) at Wells Fargo are focused on building lifelong relationships with customers, both consumers and small businesses. Successful bankers demonstrate a genuine interest in their customers and ask questions to understand their financial priorities and meet their needs. Personal Banker 2s develop strong relationships with other Wells Fargo partners that enable them to introduce customers to specialists who can assist with specific financial needs. PB2s present options to customers about ways to make their banking easy and convenient, ensuring the needs of the customer always come first. PB2s may also proactively follow up with customers by phone to ensure customer satisfaction, build relationships, and address any additional financial needs based on the customer’s financial priorities. Special emphasis is placed on assisting customers with more complex needs such as personal financial reviews, lending services, small business needs, and retirement.

## How a Personal Banker 2 helps customers succeed financially

### Put customers at the center of everything you do:

- Display a friendly, positive attitude toward serving customers and possess strong customer service skills
- Build relationships with customers that go beyond one interaction, focusing on the customer’s long-term needs
- Engage customers in meaningful financial conversations that include understanding what’s important to them
- Inform customers of appropriate options available to help them achieve their financial goals
- Proactively follow up with customers on commitments, satisfaction, and ongoing financial conversations to build lifelong relationships

### Earn the customers’ trust:

- Demonstrate awareness and respect for customers’ time by ensuring all interactions are efficient and accurate
- Follow all policies and procedures required to maintain accuracy, manage risk, prevent fraud, and protect customers

### Resolve customers’ complaints and concerns:

- Execute problem resolution steps in compliance with Wells Fargo Complaints Management policies
- Listen carefully to customers, displaying empathy for the customers’ situation
- Take ownership of the issue and follow up to ensure the issue is resolved

### Possess strong character and values:

- Follow Wells Fargo Code of Ethics and Sales Integrity policy
- Exhibit a high degree of integrity, trustworthiness and professionalism at all times
- Manage risk by maintaining appropriate controls to ensure operational integrity and compliance with applicable regulations, policy requirements and audit procedures

### Embrace the opportunity to learn:

- Learn the costs and benefits of products and services that can help meet customer needs
- Seek opportunities for self-guided learning and embrace coaching and feedback from fellow team members

### Work effectively with a diverse team:

- Lead by example to create an inclusive and professional environment where all team members are respected and diversity is valued
- Demonstrate genuine care for every team member, taking the initiative to assist others
- Participate in meetings and share ideas to help achieve team objectives

Together we’ll go far



## What you can expect from us

Our next big investment is in **you**. At Wells Fargo, we value and support our people as a competitive advantage. We work to attract, develop, engage and retain team members who reflect the diversity of the customers and communities we serve. We say “team members”, not “employees”, because our people are a treasured resource to be invested in, not expenses to be managed – and because teamwork is essential to our success in helping customers.

At Wells Fargo, each person is valued for individual skills and talents, has the opportunity to fulfill personal ambitions, and contributes to the success of the company. That’s why, in addition to ongoing coaching and career development, Wells Fargo provides all eligible team members with a comprehensive set of benefits designed to protect their physical and financial health and to help them make the most of their financial future.



## About us

Wells Fargo & Company is a nationwide, diversified financial services company with \$1.9 trillion in assets. Founded in 1852, Wells Fargo provides banking, insurance, investments, mortgage, and consumer and commercial finance service through more than 8,600 locations, more than 13,000 ATMs, online (wellsfargo.com), and mobile devices.

At Wells Fargo, we embrace our responsibility to be a leading corporate citizen – socially, economically, and environmentally – and the opportunity to create more resilient, sustainable communities through our operations and actions.

### **Wells Fargo’s brand is supported by principles to deliver on our purpose and promise to work together to differentiate us from our competitors:**

- Relationships that last a lifetime. We know our customers and care about them as individuals. In every interaction with us, they feel understood, recognized, and supported through their financial journey.
- Expertise and guidance to help our customers make confident decisions. We provide guidance and options so that customers can make informed choices.
- Going the extra mile to do what’s right. We put the interests of customers and communities first in all we do. We come through for them so they know we are there in good times and bad. We work to make their lives easier.



**Investment and Insurance Products: ► NOT FDIC Insured ► NO Bank Guarantee ► MAY Lose Value**

Relevant military experience is considered for veterans and transitioning service men and women.

Wells Fargo is an Affirmative Action and Equal Opportunity Employer, Minority/Female/Disabled/Veteran/Gender Identity/Sexual Orientation.

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