
Job overview

Personal Banker

What a personal banker does

Personal bankers at Wells Fargo put our customers at the center of everything they do as they spend the majority of their time supporting walk-in customers by assessing their needs, completing account openings, account transactions and servicing/cash handling activities. They may also conduct some proactive outreach for customers in the branch books of business.

Our personal bankers deliver exceptional customer experience, build relationships, and help mass consumer and small business customers succeed financially. They engage customers in conversation and ask questions to understand what's most important to them to present the appropriate products, services, and mobile options that align with their needs to allow for informed choices and help make banking easier for them.

How a personal banker helps customers succeed financially

Personal bankers are critical to helping our customers find financial success as they will build, deepen, and retain relationships with mass consumer and small business customers. Personal bankers present customers with appropriate products, services, and mobile options to align with their needs and financial goals.

As customers are empowered to use digital capabilities for more of their banking needs, our bankers are able to focus on personalized customer conversations and provide service, advice, and guidance. With customer needs continually changing, this role can meet those needs wherever the customer is in their financial journey.



Personal Bankers:

- Acquire, build, deepen, and retain relationships with mass consumer customers, (those with less than \$100K in assets, both deposits and investments, with Wells Fargo), and small business customers (those with annual sales of \$100K or less).
- Complete servicing transactions accurately and efficiently, which may include, maintaining a cash drawer, cash handling, and balancing.
- Create a great customer experience by supporting lobby leadership.
- Promote mobile solutions to customers by explaining self-service mobile options and teaching them by walking them through how to complete transactions on their own.
- Leverage tools and resources to ensure accurate and consistent information of bank products and services and connect those to customer needs.
- Refer investment, retirement, mortgage, core business, non-card/line-of-credit lending for small business, home equity, and student lending needs.
- Serve as risk management leaders by understanding and managing risks in the business, adhering to policies, procedures, and controls, and ensuring compliance with applicable laws, rules, and regulations.
- May serve as a back up to the manager.

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

© 2021 Wells Fargo Bank, N.A. All rights reserved.

What you can expect from us

Our next big investment is in YOU.

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 employees 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 (NYSE: WFC) is a leading financial services company that has approximately \$1.9 trillion in assets and proudly serves one in three U.S. households and more than 10% of all middle market companies and small businesses in the U.S. We provide a diversified set of banking, investment and mortgage products and services, as well as consumer and commercial finance, through our four reportable operating segments: Consumer Banking and Lending, Commercial Banking, Corporate and Investment Banking, and Wealth and Investment Management. Wells Fargo ranked No. 30 on Fortune's 2020 rankings of America's largest corporations. In the communities we serve, the company focuses its social impact on building a sustainable, inclusive future for all by supporting housing affordability, small business growth, financial health and a low-carbon economy.

News, insights, and perspectives from Wells Fargo are also available at: Wells Fargo Stories. <https://stories.wf.com>. Additional information may be found at www.wellsfargo.com | Twitter: @WellsFargo.

To learn more about careers at Wells Fargo and to join our Talent Community, visit wellsfargojobs.com.