

Job overview

Small Business Banker

What a small business banker does

Our small business bankers are responsible for acquiring, servicing, and growing relationships with small businesses that typically have annual gross sales between \$100k and \$1MM. They work proactively to seek new customers and engage with existing customers to understand what is most important to them and help with their current and future financial needs. Small business bankers act as the primary relationship manager for a portfolio of small business customers in an assigned territory using customer relationship management tools and systems and coordinate efforts that require resources and partners across the bank.

How a small business banker helps customers succeed financially

Small business bankers provide a full range of services to core small business customers with complex needs, provide exceptional customer service, and build relationships. They engage customers in conversations and share ways Wells Fargo can help, which may include introducing them to another branch employee or sharing mobile options that may be more convenient for them.

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, bankers in this role can help customers succeed wherever they are in their financial journey.



Small Business Bankers:

- Build and grow relationships with a dedicated book of small business customers by asking questions to learn about their financial needs, understanding their goals, and sharing how Wells Fargo can help them by following up through proactive outreach, phone or in-person visits.
- Complete service requests, identify, and resolve customer concerns by following resolution protocol.
- Maintain primary focus on small business products and services, and serve or refer the small business customers' consumer needs.
- Engage with customers in all phases of the business life cycle while following policies and leveraging product knowledge and conduct needs-based conversations to identify credit, deposit, and service processing needs.
- Build relationships with branch employees and make introductions to appropriate partners to help meet customers' broader financial needs.
- Participate in community organizations and build relationships with centers of influence.
- Serve as leaders in understanding and managing risks in the business, adhere to policies, procedures, and controls, and ensure compliance with applicable laws, rules, and regulations.
- Explain and demonstrate self-service mobile options to customers.

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.

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