



## PRIVATE BANKER

### DUTIES

- The Private Banker manages and develops a franchise through direct prospecting and/or recommendations. He/she may be assigned to Groupe BPCE networks.
- He/she is also the guarantor of the Net Revenues generated by his/her franchise and must use all available means to develop it, within the bounds of his/her duty to advise, through sales of group OPCVM funds, discretionary and advisory management, tax optimization products, FCPI innovation funds, structured products, new credits, etc.
- He/she manages relationships with in-network contacts and third-party business finders and prospects directly for clients in order to develop new business.
- As the gateway for the client relationship, he/she offers advisory services (upstream from an ownership/financial transfer) by relying on the Bank's Appraisal department and the Asset managers. He/she is responsible for implementing the sales policy with his/her clients.