



Understanding that exceptional people... create exceptional circumstances!

Who we are: We are a bank that knows our clients by name, understands their banking needs and works as a team to provide the highest level of service possible. We provide modern banking strengthened by a renowned tradition of service. We offer our clients choice and flexibility in managing their finances, while preserving the personal touch and accessibility they expect from their Bank.

What to expect: Driven by shared values of team spirit, commitment, responsibility, and innovation, all our teams are focused on delivering a truly personal service. All team members, regardless of their role, help create better deeper, more personal relationships with our clients, while offering them a greater level of service and opportunity. As a subject matter expert, you will have access to all decision makers.

Here's what you'll do:

We're expanding to Temecula! The **Business Development Officer** is responsible for the acquisition of new clients and expanding share of wallet of existing clients.

- Utilizes a robust network of local centers of influence and commercial businesses that can be leveraged into profitable relationships.
- Maintains strategic relationships with all key lines of business to effectively refer business and leverage partnerships to deepen and enrich the client experience.
- Works as the trusted advisor, manages the client relationship by selling and promoting a broad array of financial products and services, provides pertinent financial information to clients, and identifying/referring cross- marketing opportunities.
- Develops bank relationship with small to medium clients.
- Generates new client relationship through prospecting, outside calling, networking, and referrals. Makes a substantial number of outside, in-person calls on prospects and clients requiring extensive automobile travel.
- Develops and maintains a referral source database for commercial marketing purposes.
- Works to foster new and expand existing client relationships through cross-selling products and services in a consultative manner.
- Researches and fully understands competitors - strengths/weaknesses and product offerings/pricing.
- Assists the bank in the promotion of all product lines offered in assigned market.
- Represents the Bank in various community, civic and community reinvestment functions to further enhance the Bank's image and develop additional business; assists the Bank in establishing and maintaining market position in the financing arena.

What you Need to Succeed:

- 2+ years' experience in business development.
- Bachelor's Degree (BA) or equivalent, with a concentration in finance/business or 2 years of related experience in banking and finance or equivalent combination of education and experience preferred.
- Excellent presentation, verbal, and written communication skills.
- Knowledge of financial products and banking regulations.
- High energy, results-oriented, goal achiever, and works well in a team environment.
- Excellent Microsoft skills in power point, Excel, Word, Outlook, Teams, and video conferencing. Team, and on-line presentations.



- Current Driver's License and a vehicle with appropriate insurance coverage to drive while performing assigned duties and responsibilities.

What's in it for You:

Excel Bank offers competitive compensation and incentive packages, along with comprehensive benefits that includes:

- Annual Salary Range: \$80,500.00 to \$104,410.00
- Robust Incentive Plan paid quarterly.
- Excellent comprehensive benefits package includes medical HMO or PPO, dental, and vision.
- Bank Paid life and long-term disability.
- Matching 401(K).
- Flexible Time Off
- Sick Time Benefits.
- Paid Bank Observed Holidays.
- We offer a highly desirable work environment with committed banking professionals who value teamwork and collaboration.

INCLUSION AND EQUAL OPPORTUNITY EMPLOYMENT

Excel Bank is an equal opportunity employer committed to diversity and inclusion. All qualified applicants for employment at Excel Bank will receive consideration for employment without regard to race, religion, color, sex, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, age, protected medical condition, disability, or any other protected status in accordance with all applicable federal, state, and local laws.

To apply for this position, please send your resume and cover letter to:

<mailto:careers@excel.bank>

© 2023 EH Private Bank
Member FDIC