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Job Title:	Senior Relationship Manager
Department:	Market Development
Reports to:	EVP, Market Executive
FLSA Status:	Exempt

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### **PURPOSE:**

This Senior Relationship Manager is responsible for leading, developing and guiding strategies in a forward-thinking manner focused on overall business development growth at City First Bank (CFB) in the Southern California market. This entails managing existing and developing new relationships and plans that expand the geographic footprint and identifies networks and programs supporting the bank. The Senior Relationship Manager shares responsibility with the Heads of Retail Banking and Wholesale Lending to develop and maintain visibility and strategic relationships with non-profits, developers, businesses, and relevant governmental agencies, association networks and others to promote City First.

This role will execute a strategic approach to market growth, which incorporates market research, product development, strategies to identify deal opportunities and efficiencies of deal flow bank-wide. Critical to success, the Senior Relationship Manager is a close and willing collaborator with the EVP, Market Executive, Heads of Retail Banking, Wholesale Lending, and the Director of Marketing (as well as other CFB, CFE, and NMTC leaders).

This role serves on and supports the Market & Community Development Committee and will support the SOCAL Advisory Board and may serve and support other Committees as assigned.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

#### **1. Business Development Strategy**

- Develops and executes on the SOCAL plan for strategic lending partnerships with regional non-profits, housing organizations, government agencies and business groups to drive increased lending volume to the Bank in desired industry segments. Participates in the community outreach process and actively participates in key community organizations,



meetings and events.

- Identifies and manages target SOCAL market segments in alignment with the Bank's value proposition based on market research.
- Creates and maintains deal strategies based on Centers of Influence.
- Develops, maintains and reports on an individual calling program focused on expanding and attracting new business relationships.
- Establishes and maintains relationships with industry influencers and key community and strategic partners.
- Recommends new traditional and non-traditional products and services to generate fee, contract and service revenue and recommends the most cost-effective strategies to deliver such programs.
- As requested, provides counsel and assistance to CFE and Bank Executives and staff through joint calls, training and mentoring.
- Exhibits collaboration, leadership, and essential teamwork in the business development process and representation of the Bank
- Fulfills individual goals (and assists with departmental and bank-wide goals) to increase loans and deposits, maintain quality, generate fees, make referrals, and attain profitability goals.
- Presents loans for approval to the CCO, Managers' Loan Committee (MLC) and Directors' Loan Committee (DLC) of the Bank, as required.
- Serves on at least one business or community organization board directly aligned with the Bank's mission.

## **2. Market Research and Development**

- Ensures existing commercial loan and deposit commercial, non-profit and real estate customers receive the best possible combination of products and services from City First Bank
- Ensures Customer Relationship-Annual Reviews are performed on a timely basis for those relationships which exceed \$500,000.
- Strategically ensures customers are aware of all services to ensure we provide a full array of Bank products and stay abreast of customer needs.
- Originates and manages a significant portfolio of key relationships.
- Observes quality of total customer management to ensure and provide "best in class" customer service.

## **Leadership and Supervision**

- Embraces and advances the **City First Strategic Framework**, pursuing and effecting the Three



Key Strategic Priorities as specifically articulated therein, centered around **Impact, Leadership and Culture.**

- Creates an atmosphere within the organization that attains and maintains a high level of morale and embraces our Vision, Values, Mission and Team Expectations.
- Demonstrates and models stellar collaboration in Bank Leadership and business development execution.

### **QUALIFICATIONS, EXPERIENCE AND EDUCATION**

Bachelor's degree (BA) or equivalent from a four (4) year college or university, ten (10) years related experience and/or training or the equivalent combination of education and experience.

- Prior experience in a Senior Relationship Manager capacity or similar role along with deep knowledge of community development landscape and specialized experience in a commercial lending environment to include underwriting, lending and exposure to loan administration processes. Work-related experience should consist of lending in a financial institution and formal credit training is preferred.
- Must be able to simultaneously function at a strategic level while also demonstrating a willingness to roll up your sleeves to get the job done. Must be flexible and agile and able to function at a high level in the midst of changing priorities in a fast-paced environment. Knowledge of related state and federal lending and compliance regulations, and other bank lending policies. Strong ability to develop marketing and business development skills with customers. Excellent oral, written and interpersonal communication skills- ability to quickly build rapport in order to engage team members and gain support of peers and other key stakeholders. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations. Excellent organizational and time management skills. Strong leadership ability and experience in developing a lending team. Mastered experience, knowledge and training in all lending activities.

### **DEMONSTRATED SKILLS/COMPETENCIES**

Knowledge and training in financial statement and tax return analysis

Knowledge and training in all lending activities

Knowledge of commercial, and commercial real estate loan processing

Excellent oral, written and interpersonal communication skills with the ability to carry out instructions, instruct others, interpret documents, understand procedures, write reports and correspondence,



Speak clearly to customers and employees.

Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.

Ability to maintain focus despite many interruptions

Basic knowledge of branch operations, bank products and services

Excellent organizational and time management skills

Ability to lead less experienced relationship managers and other staff members as assigned.

Possess excellent leadership skills

Possess excellent training skills

Possess effective time management skills