

Job Posting

MidFirst Bank

Treasury Management Associate

- Job ID #: 12583
 - Facility: AZ - 3030 Camelback
 - Department: Treasury Management Sales
 - Hours of Work: 40
 - Experience Required: 1 - 3 Years

 - Location: Phoenix, AZ
 - Functional Area: Banking
 - Employment Type: Full-Time Regular
 - Education Required: Bachelors Degree
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Position Description:

The Treasury Management Associate will provide sales, implementation and client servicing support. Primary responsibilities of the job include:

TM Sales Support

1. Assists TMSOs in proposal preparation, RFP responses, pricing analysis and TM Relationship Reviews
2. Aids TMSO in pushing sales to close through strategic follow up with the client as determined by the TMSO
3. Maintains an agreed upon pipeline meeting with each TMSO to:
 1. Review pipeline including prospects and current live deals
 2. Review any pre-call planning needs
 3. Discuss upcoming proposal or relationship review needs
 4. Look for any opportunities to assist TMSO with pushing deals to close
 5. Help TMSO work through sales and prospect reporting
 6. Aides with follow up items from LOB partner reviews
 7. Works with TMSO on annual product campaigns and initiatives

Implementation Responsibilities

1. Prepares paperwork and assists with getting necessary client signatures

2. Tracks the implementation process to ensure timely set up of new products and services
3. Organizes client trainings with the Implementation Specialist
4. Validates proper billing and exception pricing are complete after new product implementation
5. Performs routine review of clients with implemented services that are not being utilized

Client Servicing Responsibilities

1. Helps service existing client needs along with Commercial Services as necessary driving the follow up process with the client and ensuring client's needs were met
2. Monitors the TM Sales Line/TMO Sales Inbox and directs incoming inquiries to the appropriate person or department
3. Provides sales support directly to external clients, TMSOs and RMs

Position Requirements:

This position requires a Bachelor's Degree and a minimum of 1-3 years banking experience. Treasury Management experience is preferred but not required.

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