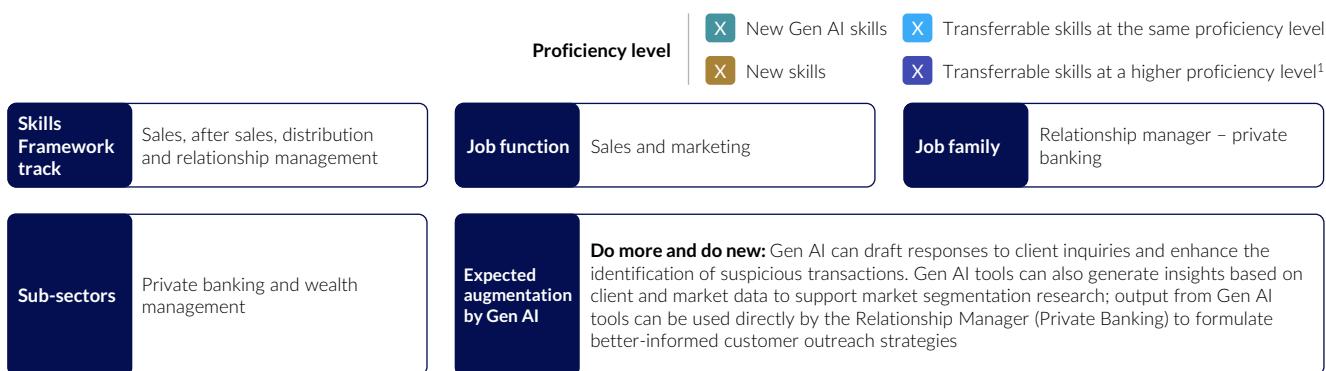


## Assistant relationship manager – Private banking



### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage customer lifecycle end-to-end	Respond to inquiries in a timely fashion to help support positive client experiences Identify and flag suspicious transactions under account portfolio for further review Gather customer documents for KYC and onboarding procedures
Advise customers on products, services, and investment strategies	Collate documents for team members to present financial solutions to clients Demonstrate an understanding of internal and external compliance and regulatory guidelines Provide assistance in portfolio-metric reporting
Acquire and manage the portfolio of customers	Support strategies to identify new clients through market segmentation research Communicate with product specialists and other stakeholders to support customer relationships

### New Gen AI skills

Prompt design	2
Gen AI principles and applications	2
Ethical and responsible Gen AI adoption	2

### Additional skills required for potential redesigned role

Role 1: Investment counselor assistant (adj. <sup>2</sup> Score: 0.73)				
Ethical culture	3	Climate change management	3	Personal finance advisory
Stakeholder management	3	Customer relationship management	3	Market research and analysis
Account management	3	Natural capital management	3	Business environment analysis
Business opportunities development	3	Non-financial-industry sustainability developments	3	Customer acquisition management
Carbon markets and decarbonization strategies management	3	Sustainable investment management	3	
Client investment suitability	3	Product advisory	3	

### Role 2: KYC/Customer due diligence analyst (adj. Score: 0.55)

Ethical culture	3	Customer relationship management	3	Taxonomy application	3
Stakeholder management	3	Service challenges	3	Continuous improvement management	3
Account management	3	Data governance	3	Regulatory compliance	3
Customer acceptance checking and onboarding	2	Regulatory risk assessment	3		

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework