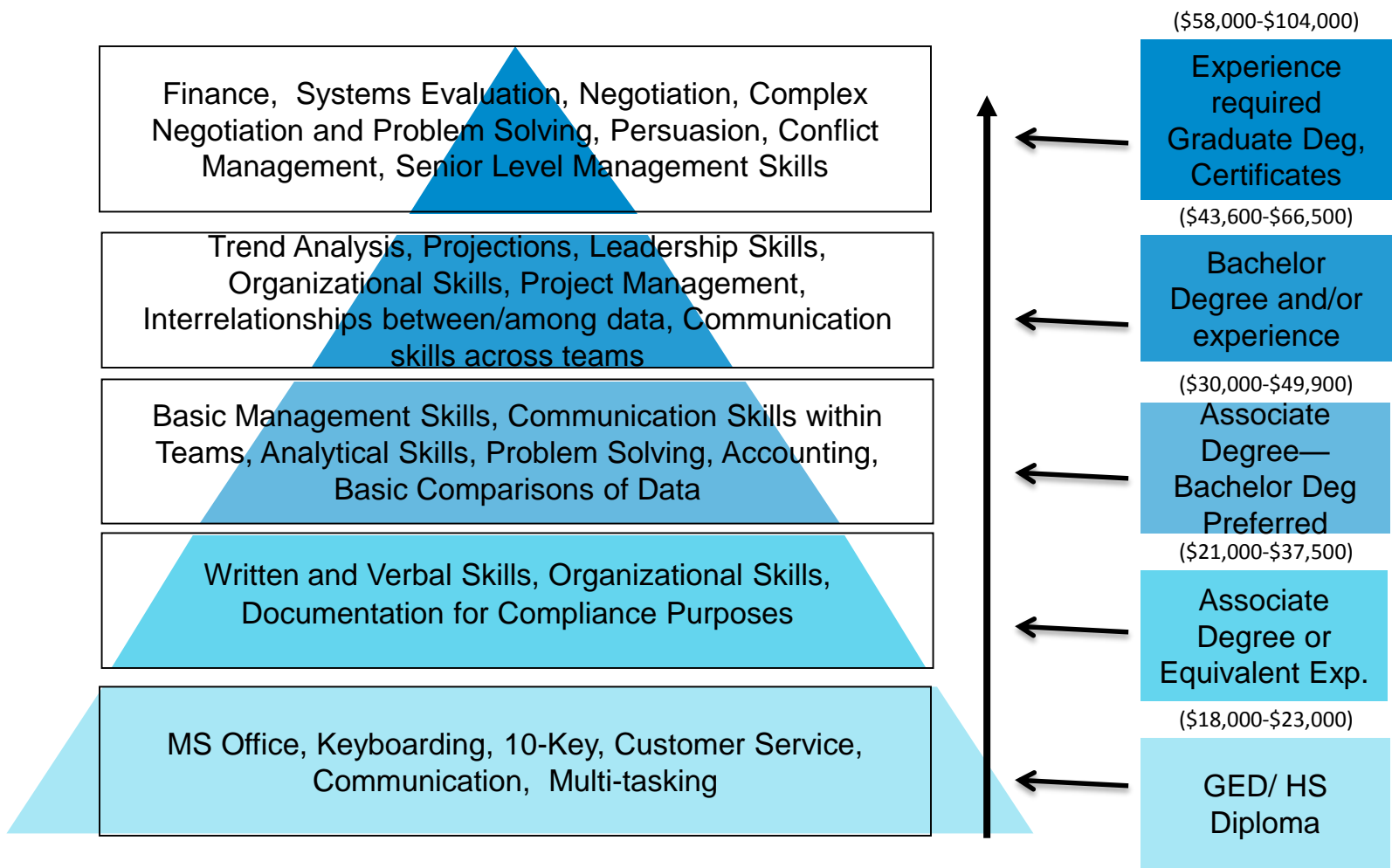


Financial Services CAREER PATHWAYS MAP



Starting base salary ranges are listed and do not include benefits; experience and education requirements are minimums.

Financial Services

JOB TITLES WITHIN EACH LEVEL



Job Level	Financial	Retail Banking	Insurance
1	Customer Service Rep, Processor/ Operations, Mailroom/ Imaging, Administrative Assistant, Accounting Clerk	Teller, Head Teller, Administrative Assistant, Customer Service Rep, Loan Administration Rep	Admin Support/Secretary, Insurance Clerk, Service Rep, Claims or Insurance Processor, Training Coordinator, Underwriting Tech
2	Collections, Telesales, Senior Administrative Assistant	Personal Banker, Credit Analyst, Loan Processor, Trust Administrator	QA Analyst, Sr Claims Rep, Lead Processor, Sr Service Rep, Training Instructor, Lead Service Rep, Insurance Trainer
3	QA, Team Lead/ Sup, Trainer, Business Analyst, Compliance, Tech Writer, Account Analyst, Accountant, Risk Analyst, Underwriter, Six Sigma Black Belt, Executive Admin Asst	Assistant Branch Manager, Business Banker, Loan Officer, Mortgage Banker	Business Analyst, QA Sr Analyst, Claims Specialist, Master Claims Rep, Service Center Supervisor, Sr Training Supervisor, Underwriter
4	Manager, Project Manager, Six Sigma Black Belt	Branch Manager, Credit Analyst, Auditor, Credit Officer, Human Resources, Trust Officer, Business Line Manager	Consultants (all functional areas), Underwriting Specialist, Claims Mgr, Training Mgr, Underwriting Mgr, Service Center Mgr
5	Function Leader-Department Heads	Market President, Trust Officer	Director (all functional areas), Claims Director, Perf Improvement/Training Director, Underwriting Director, Service Center Director

Financial Services KEY SKILLS AND COMPETENCIES



Job Level	Financial	Retail Banking	Insurance	Summary
1	<ul style="list-style-type: none"> • Use of PC • Detail orientation • Communication • Customer service • Multi-tasking 	<ul style="list-style-type: none"> • Use of PC • Customer Service • Communication • Typing • Multi-tasking 	<ul style="list-style-type: none"> • Use of PC • Customer Service • Communication • Detail oriented • Multi-Tasking 	<ul style="list-style-type: none"> • Use of PC • Customer Service • Communication • Detail oriented • Multi-tasking
2	<ul style="list-style-type: none"> • Negotiation skills • Sales techniques • Planning/organizing 	<ul style="list-style-type: none"> • Customer service • Written and verbal • Communication • Org skills • Documentation 	<ul style="list-style-type: none"> • Communication • Analytical skills • Problem solving • Investigative skills 	<ul style="list-style-type: none"> • Customer service • Written and verbal • Communication • Org skills • Documentation
3	<ul style="list-style-type: none"> • Problem solving • Analytical skills • Written/ verbal • Technical skills • Initiative 	<ul style="list-style-type: none"> • Business Analysis • Project mgmt • Communication • Problem solving 	<ul style="list-style-type: none"> • Business analysis • Supervisory skills • Initiative • Communication • Problem solving 	<ul style="list-style-type: none"> • Analytical skills • Communication skills • Problem-solving
4	<ul style="list-style-type: none"> • Autonomy • Coordination • Problem solving • Negotiation • Conflict resolution 	<ul style="list-style-type: none"> • Analytical skills • Communication skills • Trend analysis • Accounting 	<ul style="list-style-type: none"> • Leadership skills • Project mgmt tools and methodologies • Organizational skills 	<ul style="list-style-type: none"> • Analytical skills • Communication skills • Leadership skills • Organizational skills
5	<ul style="list-style-type: none"> • Strategic thinking • Collaboration • Leadership skills • Robust functional knowledge 	<ul style="list-style-type: none"> • Negotiation • Problem solving • Strategic thinking • Conflict resolution 	<ul style="list-style-type: none"> • Project Mgmt skills • Organizing & plng • Conflict mgmt • Strategic thinking 	<ul style="list-style-type: none"> • Problem solving • Negotiation • Conflict resolution • Project mgmt • Strategic thinking