

Solutions and Service Delivery > Other Services

Title	Provide referral for other professional services
Code	106630L4
Range	Referring suitable professionals to private banking clients. This applies to different kinds of professional services required by private banking clients, e.g. investment banking services, overseas property management, tax consulting, insurance brokers, company secretarial, immigration services and any other private client requirements, etc.
Level	4
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand the needs and guidelines in business referrals <p>Be able to:</p> <ul style="list-style-type: none"> • Review the profile of private banking clients in order to identify their needs on different types of services • Examine the bank’s guidelines on referral for private banking clients in order to provide the best solutions to clients while protecting the interests of the bank • Summarize appropriate professional services available in the bank and in the market 2. Identify the needs of clients <p>Be able to:</p> <ul style="list-style-type: none"> • Provide suggestions to clients about professional services in relation to managing their wealth • Discuss with clients to clarify the scope of services they need and identify how the services can benefit them • Coordinate meetings as and when required, and be aware of any conflict of interest 3. Liaise with other professionals in sourcing suitable services <p>Be able to:</p> <ul style="list-style-type: none"> • Source and identify suitable service providers according to the needs and requirements of clients • Liaise with professional services vendors to provide client with information of products and services • Coordinate between client and different service providers to ensure effective and efficient completion of tasks • Develop, expand and maintain solid relationships with different service providers
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Referrals of professional services providers to private banking clients which can satisfy their needs and requirements.
Remark	