

Client Management, Advisory and Support > Account Management and Servicing

Title	Provide information updates to clients
Code	106860L3
Range	Providing information updates to private banking clients to keep them informed about the status of their portfolio and market conditions.
Level	3
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand account services to private banking clients <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate good understanding of operational procedures of account services to private banking clients in order to carry out the job independently • Demonstrate basic understanding in the features and terms of different private banking accounts in order to provide suitable updates to clients 2. Provide updated account information to clients <p>Be able to:</p> <ul style="list-style-type: none"> • Report account information to clients (e.g. profits, losses, account values) • Prepare reports on transactions and investment performance for clients • Produce customized reports at client request 3. Provide updated market information to clients <p>Be able to:</p> <ul style="list-style-type: none"> • Inform clients about the market conditions, e.g. price, volume, competition • Tracking price fluctuations of different assets and provide updates to clients • Provide clients with information regarding new products and services
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of updated information to private banking clients in accordance with the bank's procedures.
Remark	