

**Title:** Senior Relationship Manager – Middle Market

**Location:** Thousand Oaks, CA

**Onsite/Hybrid/Remote:** Hybrid

**Organization Type:** Bank

**Time zone:** PST

**Salary Range/Compensation:** \$205k - \$215k, discretionary bonus of 45-100%

**Client:** Confidential

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### **Company Overview:**

Our client is a top 20 financial institution in the United States with a strong presence across key markets. It is known for its customer-focused approach and innovation in digital banking. It offers a diverse range of financial services, including commercial lending, wealth management, and retail banking. Our client stands out for its commitment to professional development, diversity and inclusion and its strong corporate values. It provides competitive compensation, comprehensive benefits, and career advancement opportunities in a dynamic, growth-oriented environment. It has solidified its market position, making it an attractive employer for professionals seeking long-term career stability and growth in the banking industry.

### **Job Description:**

Our client is looking for a **Director-level Senior Relationship Manager** to drive business growth in the middle market covering Ventura County north to San Luis Obispo. **The ideal candidate is a seasoned relationship manager with deep expertise in the middle-market banking, is an expert at bringing together an internal team for the benefit of their clients and has a strong presence in the community.** As a middle-market banker, you should be experienced in servicing clients with revenues from \$50-\$400 million in revenues or higher.

### **About the Role:**

In this role, you will take ownership of **business development, client acquisition, and relationship management**, working with a diverse portfolio of clients across multiple industries. Your ability to cultivate strong partnerships with **key decision-makers, COIs, and internal banking teams** will be critical to success.

Collaboration is key—you will work closely with **credit, treasury, and product specialists** to deliver tailored financial solutions while ensuring a seamless client experience. Additionally, you will contribute to an integrated banking approach across **wealth, retail, small business, and capital markets**.

### **What You Will Do:**

#### **✔ Expand Market Presence**

- Identify and secure new middle-market clients, leveraging established industry relationships.
- Develop strategic sales plans to **increase market share** and revenue growth.
- Stay ahead of industry trends to provide clients with **valuable insights and innovative solutions**.

#### **✔ Manage and Strengthen Client Relationships**

- Serve as a **trusted advisor** to clients, understanding their business needs and financial goals.
- Partner with internal teams to provide comprehensive banking solutions and exceptional service.
- Lead negotiations and oversee deal structuring to ensure successful client outcomes.

✔ **Portfolio & Risk Management**

- Maintain a strong portfolio, ensuring adherence to **credit policies and risk management standards**.
- Conduct client reviews, financial assessments, and compliance evaluations.
- Work cross-functionally to mitigate risks while optimizing client solutions.

If you're a results-driven relationship manager looking to make a lasting impact by providing solutions to businesses in your community, we want to hear from you! Apply now or reach out for a confidential conversation.

**Education and Experience:**

Bachelor's degree is strongly preferred as is ten years of experience in Commercial Banking.

**Skills:**

- ✔ **10+ years** of experience managing middle-market banking relationships (**\$50M+ revenue**).
- ✔ A **proven track record** in business development and revenue generation.
- ✔ Deep understanding of **credit risk, financial structuring, and treasury products**.
- ✔ Expertise in **negotiating contracts, handling complex deals, and responding to RFPs**.
- ✔ Strong leadership, **strategic thinking, and problem-solving skills**.
- ✔ Ability to collaborate across departments to deliver a seamless client experience.
- ✔ **Bachelor's degree** in Finance, Business, or related field (MBA preferred).

**[APPLY HERE](#)**

**Important Note:**

This position will be considered "open" until final selection is made. **Candidates must apply ASAP for first consideration.** If you are interested in learning more, would like to be considered for future roles, or know of qualified individuals you would like to refer, please contact or submit your resume [psmith@berkeleysearch.com](mailto:psmith@berkeleysearch.com).