

## **Broad Roles and Responsibilities**

### **WB Service- CA CSO**

CA CSO under CSD channel will provide a single point of contact to CBG/WBG relationship managers on all aspects of servicing wholesale banking customers.

**The primary responsibilities of CA CSO include:**

#### **Transactional/Operational Responsibilities:**

1. Service CBG and WBG clients across all CA-SRs
2. Process the CA-SRs based on bank's guidelines with compliance.
3. Keep record of all the documentation and customer instructions across all CBG/WBG customers.
4. All service requests need to be taken with adequate proof and should comply with extant circulars and guidelines issued by the Bank
5. To follow up any outstanding issues related to CA-SRs
6. Ensure that they collect instructions duly signed by valid authorized signatories.
7. 100 % Compliance in handling the stationery and securities related to CBG/WBG
8. Maintenance of highest level of compliance and audit rating related to CBG/WBG SRs.

#### **Servicing Role of CA-CSOs**

1. Scrutinize the inward and outward clearing reports and arrange for funding of accounts by connecting them and avoiding dishonour of the cheque.
2. Provide for demos on WB digital platforms to customers (CIB/TF Connect/FX Connect/e-Forex/Paypro etc)
3. Support to RMs in cross-selling and upselling of various WB products and increase PPC in the branches CBG/WBG Portfolio
4. Will aid in seeding and cross pollination of CMS/Trade and Fx Solutions in the CBG/WBG Portfolio.
5. Proactively provide CBA customization and will also identify prospective customers for such customization.
6. attend compliance pendency at branches especially on the Re-KYC, BO and PAN update.
7. Reach out to the CBG/WBG Clientele and focus on deepening of balances through prompt and efficient servicing.

#### **Why Join Us as a CA CSO?**

1. **Strategic Impact:** Be the single POC for high-value CBG/WBG clients, directly influencing client satisfaction and retention.
2. **Diverse Exposure:** Handle a wide spectrum of service requests—from clearing and documentation to digital onboarding and compliance.
3. **Digital Leadership:** Champion the adoption of cutting-edge platforms like CIB, FX Connect, and PayPro through client demos and support.
4. **Cross-Functional Collaboration:** Work closely with RMs, CMS, Trade, and FX teams to drive product penetration and portfolio growth.
5. **Compliance Excellence:** Uphold the highest standards in audit, documentation, and regulatory adherence—earning trust and credibility.
6. **Client-Centric Growth:** Play a key role in deepening client relationships through proactive servicing, balance enhancement, and customized solutions.