



September 29, 2020

TRUST OFFICER & FINANCIAL CONSULTANT – MARINETTE, WI LOCATION

**FULL TIME CAREER OPPORTUNITY:**

Are you dedicated to helping clients in every stage of their financial life? Have you obtained Series 7 & 66 licenses? Do you have the ability to service an existing client base and aspire to continue to build a strong client base with the Bank's exceptional referral system? Do you desire to be in a progressive, innovative, team-oriented professional environment with deep community roots & history? If you answered yes to these questions, The Stephenson National Bank & Trust would like to meet you. Our Trust & Investment Department has a great career opportunity available in the Marinette, WI location. Review the job details and qualifications below and submit your resume for consideration. Email Resume to: [employment@snbt.com](mailto:employment@snbt.com) or mail it to PO Box 137, Marinette, WI 54143. Equal Opportunity Employer

**SUMMARY:**

Trust Officer & Financial Consultant – Dual Trust & Investment Center (LPL) role as an Advisor/Trust Officer providing relationship management, administrative services, and advice to an assigned book of Trust Department/Investment Center client accounts including Investment Management Accounts, Annuities, Insurance and IRA's. Additionally, the position is responsible for acquiring new client relationships.

**MAJOR ACCOUNTABILITIES:** apply to both Trust & Inv Center/LPL roles

1. Customer Service – Listens to customer questions, requests both in-person and on the phone; responds to customer questions and requests accurately, courteously, and in a timely fashion. Welcomes customers and ensures prompt attention to their needs. Be proactive to clients needs, do research for client's securities and litigations, and follow through on all transfer and withdrawal requests.
2. Sales & Service – Responsible for acquiring and retaining client relationships. Responsible for identifying client needs and matching them with appropriate products and services. Responsible for considering the entirety of client financial needs and making appropriate referrals to other areas of the bank. Responsible for communicating investment changes/ideas are communicated to clients.
3. Compliance & Administrative – Responsible for ensuring client paperwork & files are compliant with all regulations and SNBT policies. Responsible for conducting timely & complete client reviews & proactive meetings, and thoroughly documenting the files & CRM system.
4. Other – Responsible for completion of other client and/or department tasks as assigned by the department manager.

**SKILLS & QUALIFICATIONS:**

Prior experience in trust & investments is required. Must have and maintain required brokerage industry licensing. Professional designations, such as the CISP, are strongly desired. A degree in finance/business/law/accounting or related field is preferred. Functional knowledge of investments and banking products is required. Must have experience working in an office environment that includes customer and client contact in sales, service, and advice capacities. Knowledgeable in efficient small office management. Excellent customer service and PC skills are required.

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