

Beattie Earns Prestigious National Certification



Lisa Beattie, Personal Banker at The Stephenson National Bank & Trust (SNBT), recently earned the prestigious Certified IRA Services Professional (CISP) designation from the Institute of Certified Bankers (ICB). She was awarded this designation after participating in a stringent week-long training in Baltimore, Md., culminating in passing the rigorous certification exam.

Beattie joins a group of nine other SNBT employees who hold the CISP designation. These CISPs are trained to assist people with every facet of an Individual Retirement Account (IRA). From helping those who are just starting to plan, are well on their way, or are even currently retired, a CISP can give guidance on properly handling IRAs to maximize income during retirement.

“In total, we have a team of 15 Retirement Experts who hold a collective 28 advanced credentials in financial planning. People may ask why we place such an emphasis on credentials,” explained Daniel J. Peterson, SNBT president and CEO. “For starters, our employees are committed to helping individuals and business owners achieve their retirement goals, which requires knowledge that goes beyond the generic ‘retirement planner’ title. This advanced education allows SNBT to stand apart from other financial institutions in our region by having the largest group of accredited employees ready to serve our customers’ needs.”

The CISP certification was designed to establish meaningful standards of knowledge and competency for IRA professionals, give formal recognition to those who meet prescribed standards, provide continuing professional education development, and abide by a strict code of ethics. The ICB, with 8,000 certified members, provides financial services professionals with confidence, credibility, and recognition through its certifications. As a subsidiary of the American Bankers Association, ICB promotes the highest standards of performance in the financial services industry by validating individuals’ knowledge and expertise.



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Having joined SNBT in 2011, Beattie has nine years of banking experience. As a Personal Banker, her primary responsibility is to help identify the financial goals of individuals and businesses and ensure that they are utilizing the right products and services to meet those goals.

The Stephenson National Bank & Trust is a 139-year old independent community bank with \$750 million in Bank, Mortgage, and Trust & Investment assets under management. Offices are located in Marinette and Oconto, Wis. and Menominee, Mich. with a Trust & Investment Office in Marquette, Mich. For more information about The Stephenson National Bank & Trust visit www.snbt.com.

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