



The National Bank of Indianapolis
Job Posting: Client Support Manager, Emerging Investor Markets

A Stable and Growing Employer

The National Bank of Indianapolis is the largest, locally owned, national bank in greater Indianapolis. Since opening our doors in 1993, we have grown from 18 employees to more than 300 employees. Our strength and success in serving the local market is directly attributable to our talented staff. With greater than 90% staff retention year after year, and with a highly competitive benefit package, our staff enjoy a sense of stability not always experienced in the general work environment. Benefits include but are not limited to: medical/dental/vision/life insurance, vacation, personal time, holidays, tuition reimbursement, 401(k), profit sharing, and wellness benefits.

Who We Are Looking For

The National Bank of Indianapolis has assembled our talented staff by hiring only the best, whether highly experienced professionals or those just entering the workforce. We are looking for those who are committed to delivering superior service to our clients and superior teamwork to their co-workers. Along with the relevant knowledge and experience, The National Bank of Indianapolis requires its employees to have both a high degree of professionalism and a commitment to excellence.

How to Apply

To express interest in an open position at the Bank, please email your resume to Resumes@NBofI.com or call 317/261-3271.

We invite you to learn more about The National Bank of Indianapolis at
<http://nbofi.com/careers.php>

The National Bank of Indianapolis is an Equal Opportunity Employer
(Minority/Female/Disability/Veteran)





JOB POSTING: Client Support Manager - Emerging Investor Markets

Purpose of Position: Assist with account administration, maintenance and recordkeeping for investment accounts within the emerging investor market, including daily transaction activity and client support. Routinely interacts with investment officers and trust operations staff. Exercises independent judgment and discretion in order to plan, prioritize and organize workload. Work is frequently performed with limited direct supervision. The incumbent provides the highest quality service to every customer.

Essential Functions:

- ◆ Manages investment account administration, including:
 - new account set-up and maintenance
 - coordination and tracking of account initial funding
 - daily client communications, including troubleshooting and problem solving
 - monitoring of daily client transactions
 - preparing account deposits and disbursements
 - preparing and maintaining account documents and forms
 - preparing client/account correspondence
 - tracking client fees and account balances
 - account-specific system maintenance
- ◆ Organizes and tracks applicable tax reporting
- ◆ Manages and maintains client files
- ◆ Prepares client and prospect investment presentations and maintains meeting records
- ◆ Runs asset allocation software and prepares customized reports for clients and prospects
- ◆ Stays current on industry developments, and reports to team as necessary
- ◆ Maintains customer relationships by displaying a “service oriented” attitude
- ◆ Schedules and coordinates client and prospect meetings, as needed
- ◆ Prepares packets and minutes for Market Street Subcommittee
- ◆ Manages appointment calendar for Investment Officer

Requirements:

- ◆ High School diploma or equivalent required; college degree in finance-related discipline preferred
- ◆ Minimum of 2 years of experience in an administrative role supporting wealth management, investment management, or portfolio management activities; experience with IRA accounts preferred
- ◆ General knowledge and understanding of investment accounts, and applicable laws and regulations
- ◆ Proven reliability and dependability; demonstrated ability to work successfully with minimal supervision
- ◆ Excellent interpersonal skills, exhibiting a high degree of professionalism
- ◆ Excellent communication skills (written and verbal), with strong emphasis on responsiveness and service
- ◆ Strong team orientation and demonstrated work ethic
- ◆ Experience with and good working knowledge of standard computer applications, including Word and Excel
- ◆ High degree of accuracy and attention to detail; ability to solve problems, organize and prioritize tasks

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