



**The National Bank of Indianapolis**  
**Job Posting: Client Support Manager, Private Banking**

**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 330 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, as evidenced during the global pandemic and recent Great Recession, when many employers reduced staff and benefits. 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 coworkers. 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](mailto: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**

### **Position: Client Support Manager, Private Banking**

#### **Purpose of Position**

Working on a Private Banking team, this position serves as the primary operational contact for the Bank's Private Banking clients, partnering with the Private Banker/Team Leader and the Private Banking Officer to ensure that clients are well-served. The CSM must be able to deliver exceptional customer service and assist clients with their needs while ensuring compliance with Bank policies and regulations. Independent judgment is required to plan, prioritize, and organize a diversified workload.

#### **Essential Functions include but are not limited to the following:**

- ◆ Respond to customer questions, requests and concerns, both written and oral, in a timely manner
- ◆ Handle the operations of deposit accounts, including but not limited to opening/closing accounts, ordering supplies, preparing documents, processing stop payment requests and obtaining signatures on stop payment forms, processing internal fund transfers, assisting with domestic and foreign wire transfer requests, ordering foreign currency and foreign drafts for clients, monitoring overdrafts and contacting clients for resolution, researching information on client accounts, and resolving deposit operation exceptions
- ◆ Coordinate and manage operations of loan accounts, including but not limited to managing title searches/insurance and appraisal reports, reviewing documents, submitting loans for booking and Loan Committee, monitoring and following-up on missing collateral documents, obtaining payoffs and preparing initial funding of loans to be booked, processing loan draws and paydowns, monitoring and following-up on financial statement requirements, contacting clients on past due loan payments, and responding to client questions
- ◆ Identify opportunities for the Banker and team members to cross-sell unused Bank services
- ◆ As requested by the Banker, meet with clients to determine the types of accounts needed to address their financial needs and goals, and then proceed with opening accounts as appropriate
- ◆ At the direction of the Banker or team members, including but not limited to: assist with fine details in anticipation of client entertainment or meetings, maintain lists or records that are relied upon by the bankers, facilitate gifts or contributions for client lifecycle events, and prepare materials for presentations
- ◆ Prepare various reports, correspondence and mass mailings for Private Banker
- ◆ Assist and back-up other CSMs and departments when necessary

#### **Requirements**

- ◆ High School Diploma or equivalent; some college or a college degree preferred
- ◆ Good working knowledge of depository account products and the lending process, typically gained with two or more years in retail banking, wealth management, or a similar banking function
- ◆ Proven ability to partner with bankers to manage client relationships
- ◆ Exceptional interpersonal and communication skills (written and verbal), with strong emphasis placed on responsiveness and professionalism
- ◆ Computer proficiency, especially in Word and Excel
- ◆ Strong organizational and time management skills, as well as high degree of accuracy and attention to detail
- ◆ Excellent problem-solving and analytical skills, including the ability to gather and summarize data that supports decision-making and problem-solving
- ◆ Ability to work with minimal supervision

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