The National Bank of Indianapolis

Job Posting: Investment Officer - Emerging Investor Market

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 highly competitive compensation and benefits, 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

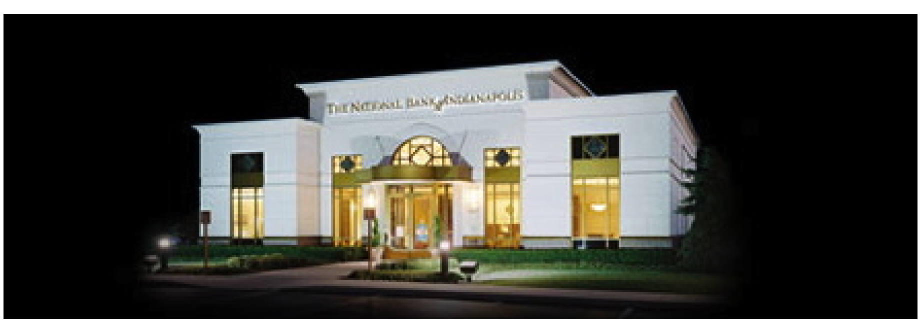
The National Bank of Indianapolis has assembled a diverse team of talented staff by hiring only the best, whether highly experienced professionals or those just entering the workforce. We are looking for those who are committed to delivering superior service to our clients and superior teamwork to their 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 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: Investment Officer - Emerging Investor Market

Purpose of Position: The incumbent is accountable for maintaining and developing existing relationships, and managing investment portfolio performance. Assists with business development, including making business development calls to prospective clients, within the emerging investor market. In addition, provides support as it relates to account administration, maintenance, and recordkeeping for investment accounts.

Essential Functions:

- ♦ Assists in business development to further support the Emerging Investor Market's portfolio; assistance may include, but is not limited to:
  - Aiding in the development of marketing, business development and retention strategies for prospects and clients
  - Calling on prospective and current clients to identify needs and/or enhancements, and to address any servicing issues
  - Scheduling and coordinating client and prospect meetings, as needed
  - Preparing and delivering client and participant investment presentations, as well as prospective client proposals, which may include facilitating risk assessments and addressing investment priorities
  - Educating clients and prospects regarding asset allocation considerations and models that are available to achieve desired financial outcomes
  - Supporting the development of Emerging Investor Market products and/or services
- ♦ Aids in the client enrollment process, which may include any of the following: registering the client in selected allocation model and facilitating set up, transferral of assets, regular client communications, monitoring of account performance, tracking of client fees, and account maintenance
- ♦ Participates in client meetings no less than annually to evaluate account performance versus the client's goals
- ♦ Contributes to monitoring investment performance against established benchmarks
- ♦ Supports in running asset allocations and preparing customized reports for clients and prospects
- ♦ Serves on various Wealth Management committees as assigned
- ♦ Stays abreast of changes in laws and regulations affecting investment accounts, IRAs and asset allocation to ensure complete compliance with applicable laws and regulations
- ♦ Maintains customer relationships by displaying a "service oriented" attitude

Requirements:

- ♦ College degree in business, economics or finance preferred, or equivalent work/educational experience; Series 6 certification helpful, but not required
- ♦ Minimum of 5 years of experience working with employee benefit plans, including any of the following: IRA's, investment models, retirement plans, or similar investment products
- ♦ Minimum of 5 years business development experience preferred
- ♦ Working knowledge of brokerage and/or investment operations
- ♦ Proven marketing, product development and business development skills
- ♦ Strong client relationship skills and excellent interpersonal skills, exhibiting a high degree of professionalism
- ♦ Excellent communication skills (written and verbal, including public speaking), with strong emphasis placed on responsiveness and customer service skills
- ♦ High degree of accuracy and attention to detail
- ♦ Experience with and good working knowledge of standard computer applications, including Microsoft Word and Excel; experience with financial planning software helpful

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