



## **The National Bank of Indianapolis**

**~ Job Posting ~**

**Client Support Manager/Administrative Assistant, 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 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 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/Administrative Assistant**

**Department: Emerging Investor Market**

### **Purpose of Position:**

Provides administrative and coordinative support for Emerging Investor Market and various Wealth Management committees. Responsible for delivering exceptional customer service to clients as well as departmental and divisional colleagues, while ensuring compliance with Bank policies and regulations. Exercises independent judgment and discretion in order to plan, prioritize and organize workload.

### **Essential Functions:**

- ◆ Provides critical assistance for Investment Officers and Client Support Managers by: scheduling and coordinating client and prospect meetings; coordinating customer entertaining opportunities and manages invitations; managing appointment calendar for Investment Officer; creating new account opening documents; running asset allocation software and preparing customized reports for clients and prospects; tracking investment performance and updating reports; responding to client questions by phone and email; preparing client and prospect investment presentations and maintaining meeting records; coordinating marketing materials
- ◆ Responds to customer questions, requests and concerns, both written and oral, in a timely manner
- ◆ Prepares monthly packets, monitors follow up items and updates information for several Wealth Management subcommittees and/or taskforces, including but not limited to Market Street Subcommittee, Investment Subcommittee, Marketing Subcommittee, and Admin Subcommittee.
- ◆ Prints and reviews various departmental reports
- ◆ Stays current on industry developments, and reports to team as necessary
- ◆ Maintains customer relationships by displaying a “service oriented” attitude
- ◆ Provides critical back-up for Client Support Manager

### **Requirements:**

- ◆ High School diploma or equivalent
- ◆ Minimum of two years of experience in an administrative role supporting client service professionals; minimum of two years banking or financial services experience
- ◆ General knowledge and understanding of investment accounts, and the laws and regulations that apply to them
- ◆ Excellent interpersonal skills, exhibiting a high degree of professionalism
- ◆ Excellent communication skills (written and verbal), with strong emphasis placed on responsiveness and customer service
- ◆ Strong team orientation and demonstrated work ethic
- ◆ Proven reliability and dependability, with the demonstrated ability to work successfully with minimal supervision
- ◆ High degree of accuracy and attention to detail
- ◆ Excellent problem solving skills and ability to make decisions to resolve problems
- ◆ Strong organizational and time management skills
- ◆ Experience with and good working knowledge of standard computer applications, including Microsoft Word and Excel

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For more information, please call Human Resources at 317-261-3271.

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