The National Bank of Indianapolis
Job Posting: Client Support Manager, Personal Trusts

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. 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 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, Personal Trusts

Purpose of Position: This position provides operational support to the Bank's personal trust clients and in-depth administration support to Trust Officers, ensuring exceptional customer service. The CSM assists clients with their needs and exercises independent judgement as it relates to individual accounts, ensuring compliance with all internal policies and procedures as well as with Bank regulatory requirements.

Essential Functions:

- Assists in opening and closing accounts, maintains regular client contact, and responds to client questions (both written and oral) in a timely manner, ensuring superior service levels
- Analyzes and researches account matters and makes recommendations to the client and/or Trust Officer as appropriate
- Coordinates and processes bill payment, disbursements, checks, transfers, wires, and deposits to and on behalf of clients, consistent with account documents
- May assist with discretionary distribution process with Trust Officer guidance
- Assists with the preparation of administrative, real estate, and unique asset reviews, and related committee tasks
- Coordinates payroll for employees of clients, interacting with external vendors as appropriate
- Prepares quarterly tax estimates and processes real estate tax payments for client accounts
- Creates client correspondence, spreadsheets and reports as needed, including follow-up lists for committees and special projects as appropriate
- Participates in client meetings as necessary
- In consultation with Trust Officer, may refer to trust agreements and related documents for administration purposes
- Monitors accounts on a daily basis for cash overdrafts and assists Trust Officer in forecasting client cash needs for distributions
- Assists with receipt, set-up and release of client assets
- Complies with all banking regulations and our own Bank policies and procedures
- Performs miscellaneous administrative functions, including but not limited to reviewing daily mail, coordinating client correspondence and special mailings, photocopying, filing and compiling marketing materials
- Provides critical back-up for other Client Support Managers within department

Requirements:

- High School diploma or equivalent
- Minimum of two years experience in an administrative role supporting client service professionals; a minimum of two years banking experience and/or supporting personal trusts preferred
- Proven written and verbal communication skills, with strong emphasis placed on responsiveness and customer service skills
- Excellent interpersonal skills, exhibiting a high degree of professionalism
- Strong team orientation and demonstrated work ethic
- 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
- Computer proficiency, including proven mastery of Microsoft Word and Excel

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