



**The National Bank of Indianapolis**  
**Job Posting: Investment Client Support Manager**

**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](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: Investment Client Support Manager**

**Purpose of Position:** This position serves as the primary operational contact and assists with account administration for the Bank's wealth management division investment accounts. 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:**

- ◆ Respond to customer questions, requests and concerns, both written and oral, in a timely manner
- ◆ Cultivate and maintain positive relationships with clients through regular, proactive communication and adherence to the Bank's Culture of Excellence
- ◆ Assist with administration of, and maintain a working knowledge of, existing DCM investment management accounts including:
  - daily client communications, including troubleshooting and problem solving
  - monitoring of daily client transactions
  - preparing account deposits and disbursements
  - preparing client/account correspondence
  - tracking client fees and account balances
  - account-specific system maintenance
- ◆ Assist with administration of new DCM investment management accounts, including account system set-up and coordination/tracking of account initial funding
- ◆ Maintain customer relationships by displaying a service-oriented attitude
- ◆ Manages and maintains client files
- ◆ Update Portfolio Managers on account system changes, client requests and daily communications
- ◆ Serve on Wealth Management committees, as assigned

### **Requirements:**

- ◆ High School diploma or equivalent
- ◆ Minimum of 2 years of experience in an administrative role supporting client service professionals; experience supporting wealth/portfolio management activities is 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
- ◆ Experience with and good working knowledge of standard computer applications, including Microsoft Word and Excel
- ◆ High degree of accuracy and attention to detail
- ◆ Ability to problem solve
- ◆ Ability to organize and prioritize tasks

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