



**The National Bank of Indianapolis**  
**Job Posting: Private Banking Officer**

**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: Private Banking Officer**

#### **Purpose of Position:**

The incumbent is accountable to market private banking services to new and existing clients, constructively interact with other bankers to achieve service objectives, and maintain and develop existing private banking relationships in order to increase the number of quality private banking relationships, satisfy the banking needs of private banking customers and ensure they are meeting profit objectives. The incumbent provides the highest quality of service to every customer.

#### **Essential Functions:**

- ◆ Develop new private banking client relationships by calling on potential customers to promote the Bank's products and service, and promote the Bank's image to develop new and expand existing private banking business and achieve profit and growth objectives
- ◆ Maintain and develop existing private banking relationships by being visible in the business community, providing quality service, selling and cross selling products and services and otherwise expanding the provision of products and services to existing private banking customers in order to meet the needs of customers and contribute to private banking profit goals and objectives
- ◆ Write, structure and negotiate all types of home equity lines of credit, other credit lines and personal loans within limits
- ◆ Effectively manage the ongoing credit quality of the loan portfolio, including: managing the number and timely resolution of any collateral exceptions experienced, managing monthly past dues to zero whenever possible, timely management of the collection of required financial reporting documents per loan agreements, and managing timely grade changes of all credits the officer is responsible for
- ◆ Effectively manage all depository activity within the portfolios with the assistance of a Client Support Manager (CSM)
- ◆ Manage private banking accounts by processing information, handling accounts, appraising assets, negotiating terms and taking care of requests or recommendations, and pursue opportunities that have presented themselves, to satisfy the banking needs of private banking customers
- ◆ Constructively interact with other bankers to achieve service objectives (such as working with commercial lenders, Wealth Management, Trust and others who have referrals), coordinating joint customer transactions and working with others to help the customer with the appropriate products and services
- ◆ Supervise a Client Support Manager (CSM) by directing, coaching and otherwise providing quality supervision in accordance with established human resource policies and procedures in order to ensure a productive work environment
- ◆ Cultivate relationships with clients and prospects through regular contact, client events and Bank entertainment opportunities (during normal business hours as well as after hours), and routine follow up
- ◆ Promote the Bank's image in the community by participating in community activities, coordinating community development efforts, and promoting involvement and participation in community service organizations to present a favorable image in the community and establish contacts that could generate new business
- ◆ Maintain appropriate knowledge and fulfill training as required under the SAFE Act/NMLSR
- ◆ Comply with all banking regulations and our own Bank policies and objectives

#### **Requirements:**

- ◆ Bachelor's degree in business or banking, or equivalent educational experience
- ◆ Three or more years of lending experience, including knowledge that encompasses commercial loans, construction lending, and residential real estate first and second loans; must display ability to confidently explain and/or discuss structuring and pricing of loans; formal credit training preferred
- ◆ Three or more years of successful business development experience
- ◆ Knowledge of banking laws and regulations
- ◆ Personal involvement in community and civic activities
- ◆ Excellent interpersonal and communication skills, exhibiting a high degree of professionalism
- ◆ Excellent customer service skills
- ◆ Experience with and good working knowledge of standard computer applications, including Microsoft Word and Excel

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