THE NATIONAL BANK of INDIANAPOLIS

The National Bank of Indianapolis

Job Posting: Vice President & Senior Portfolio 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 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)

<u>JOB POSTING</u>
Position: Vice President & Senior Portfolio Manager

Purpose of Position: Incumbent provides general portfolio management which may include specific oversight in one or more of the following areas: municipal bond investment process, taxable fixed income investment process, mutual fund investment process, and equity investment process. Meets with prospects and current clients to provide excellent customer service and attract new customers.

Essential Functions:
- Conduct meetings with clients and prospects, facilitate risk assessments and discuss individual financial goals to ensure that proposals address investment priorities
- Cultivate and maintain positive relationships with clients through regular, proactive contact, client events and Bank entertainment opportunities (during normal business hours as well as after hours), and routine follow up, ensuring adherence to the Bank's Culture of Excellence
- Educate clients and prospects regarding asset allocation considerations and models that are available to achieve desired financial outcomes
- Manage customer investment portfolios to achieve customer goals
- Meet with prospects to attract new business and assist in achieving division financial goals
- Participate in client meetings to evaluate account performance against the client's financial goals
- Maintain current knowledge of developments in portfolio management and the financial markets
- Actively support compliance with all applicable laws, regulations, and internal policies of the Bank, the Wealth Management Division, and Diamond Capital Management
- 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
- Serve on Wealth Management committees, as assigned

Depending on area of specialization, Essential Functions may also include:
- Coordinate equity analysis resulting in maintenance of the DCM working list
- Initiate additions and deletions to the DCM equity working list resulting from careful and diligent equity analysis
- Create, maintain and review DCM mutual fund approved list
- Provide portfolio management leadership in taxable fixed income philosophy, strategy and process
- Coordinate municipal bond management and asset audit strategy
- Track taxable fixed income credit quality changes
- Write the "Fixed Income Outlook" and the "Equity Market Outlook"
- Supervise the Portfolio Analysis Manager

Requirements:
- College degree in related discipline and/or equivalent years of experience in the industry
- Minimum of five years of experience working in wealth management/portfolio management
- Ability to work with minimal supervision; self-motivated and self-directed
- High degree of accuracy and demonstrated attention to detail
- Ability to interpret data and solve problems; ability to organize and prioritize tasks
- Computer proficiency, especially when using trust and banking systems; proficiency with the Microsoft Office suite of applications is highly beneficial
- Excellent interpersonal and customer service skills
- Proven ability to communicate accurately and with clarity, professionalism, diplomacy and tact, verbally and in writing

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