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**Job Title:** Client Relationship Manager

**Supervision Received:** Banking Center Manager

**Supervision Exercised:** None

**FSLA Status:** Full-time, Non-Exempt

**Summary**

This is a great opportunity for an experienced financial professional to join an established, yet entrepreneurial-minded, investment firm in a role serving as the primary bridge between the client, the financial markets, and First Bankers Trust (FBT) internal resources.

**Essential Duties & Responsibilities**

The ideal candidate should possess exceptional client management skills and demonstrate the ability to build and maintain relationships with current and prospective clients. The candidate should also have a passion for investments and a keen interest in learning and communicating our internal investment philosophy. Additionally, the candidate will be actively involved in the continued development of FBT's Investment Process along with the Chief Investment Officer and Senior Portfolio Manager. In his role, he or she may also work closely with the FBT Business Development Officer.

- Serves as **Relationship Manager** on client relationships, accountable for coordinating investments, financial planning, risk management, trust administration and other wealth management advice and solutions. This includes but is not limited to serving as primary contact for clients in:
  - Bardstown KY market
  - Owensboro KY market
  - Paducah KY market
  - Lexington KY market
- **Researches and validates** client investment objectives and risk profile, creates Investment Policy Statements, assures delivery of an asset allocation that enables the client to achieve stated objectives, and monitors overall portfolio construction to ensure alignment with client's wealth objectives
- **Conducts periodic client meetings** to review investments and client objectives, incorporating additional FBT team members (Portfolio Manager, Trust Officer, etc.) as needed. Including FBT Financial Planner in as many meetings as possible to incorporate a holistic planning based approach for clients.
- **Actively participates** in the development and execution of FBT's Investment Process
  - Capital Markets Forecasts, Asset Allocation Models, Rising Dividend Equity Portfolio
- To whatever extent possible, participate in new business development process by identifying opportunities and referring these to Business Development Officer

- Preparing and maintaining client information in accordance with documentation retention practices and procedures utilizing the client relationship management (CRM) system and all other required technology platforms

### **Qualifications**

- Commitment to the investment and wealth management industry as demonstrated by earning or working toward an advanced degree (MBA) or certification (CFA, CFP, CIMA).
- Demonstrable strong knowledge of and interest in capital markets
- Proven ability to learn and articulate complex concepts

### **Education and/or Experience**

- Bachelors' Degree Required, Masters' degree a plus
- (2) Two years' experience in a collaborative team-based environment
- Proficient in the use of the bank computer systems identified above.

### **Physical Demands and Abilities**

*The physical demands and work environment characteristics described herein are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodation will be made to enable individuals with disabilities to perform the essential functions.*

- The ability to listen to and understand information and ideas presented through spoken words and sentences.
- The ability to communicate information and ideas in speaking and writing so others will understand.
- The ability to see details at close range and at a distance.
- The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- The ability to both sit and stand for long periods.
- The ability to bend and lift up to 20 pounds.
- The ability to operate standard business equipment such as fax, computer, printer or copier.
- The ability to look at a computer screen for long periods of time.
- The ability to regularly travel to other locations if needed.
- Must be able to work on a flexible schedule that at times may include late working hours or weekend hours.
- The noise level in the work environment is usually moderate.

### **Other Requirements**

- May be required to attend activities outside the bank to stay abreast of new developments, best practices, and statutory and regulatory changes.
- Pursuant to the Drug Free Workplace Act of 1988, all employees must remain drug free and alcohol free when reporting to work, while at work and while engaged in any work related activities.
- Comply with all Bank Secrecy Act rules and regulations and any related laws and regulations.

**Note:** *This document and the statements contained within it are intended to describe the general nature and level of work being performed by the employee assigned to this position. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of the employee.*