LCNB | Investment Services

Position Description
Administrative Associate

Identifying Information:

Department: Investment Services

Reports To: Branch Office Administrator

Location: Lebanon – Main Office, occasionally may need to work at another branch location

Hours: M-Th 8:15AM – 5PM / F 8:15a – 6PM

Summary:

To provide support to the Financial Advisor(s) in the implementation of investments, operations, and service support for clients of the LCNB Investment Services program. The Administrative Associate is responsible for the efficient operation of the Financial Advisor's daily workflow and to assist the Financial Advisor(s) to maximize sales efforts and minimize their time spent on operational tasks.

Essential Duties and Responsibilities:

- Develop a general knowledge of the financial institution's investment products and be able to assist customers in all their product and service needs in the absences of the Financial Advisor(s)
- Provide courteous, efficient and friendly service to both customers and internal and external partners
- Answering incoming calls from and make outgoing calls to clients and prospects
- On a daily basis help with opening accounts, processing paperwork, move money requests and account maintenance
- Coordinating and maintaining the appointment schedule for the Financial Advisor(s)
- Responsible for tracking referrals and reporting those to various departments
- Complete monthly marketing letters (Birthday, Reviews and maturing CDs)
- Work on marketing projects related to the Investment Services Program and meet occasionally with the Marketing Department to review projects in the pipeline and discuss new ideas.
- Help coordinate social media efforts
- Assist with seminar planning
- Help the Advisor(s) keep current on advisory reviews by scheduling appointments and logging reviews
- Help maintain the CRM system used by the Advisor(s)
- Make referrals to other bank products when needs are uncovered
- Maintain confidentiality to protect customers and the Bank.
- Maintain professional image both in appearance and conversation.
- Follow all Bank policies and FINRA regulatory compliance standards.
- Perform other duties as assigned to support the Investment Services program

Required Traits/Behavioral Competencies:

- Must be highly organized and a self starter
- Must be detailed oriented
- Demonstrate the ability to identify, research and solve problems quickly
- Interact with customers, co-workers and professional partners in a highly professional manner
- Excellent communication skills with customers and both internal and external partners
- Listen effectively, learn quickly and organize work flow
- Work with minimal supervision
- Ability to shift quickly to new tasks as priorities change

Qualifications/Education/Experience:

- High School diploma or GED equivalent required
- Past Administrative/Clerical experience preferred
- Past Investment experience preferred

Job Competencies/Skills:

- General knowledge of financial industry concepts and principles
- Possess proficiency in the use of Microsoft Office Products
- General proficiency in use of various office equipment

Physical Requirements:

- Must be able to remain stationary position up to 50% of time
  Must be able to lift up to 20 lbs.

Work Environment:

- Office setting
- Full time