

# FINANCIAL ADVISOR

## Job Description



**DEPARTMENT:** Genoa Financial

**REPORTS TO:** Vice President, Genoa Financial

### POSITION SUMMARY

Responsible for helping to improve the profitability of Genoa Financial. Will be required to generate new prospects to open up new markets that will boost income for the bank and develop new business avenues. Will need to have a good grasp on industry trends and be able to collect and compare information on target markets in order to develop new business. Must spend time reaching out to prospective clients and building a strong customer base.

### ESSENTIAL DUTIES & RESPONSIBILITIES

#### Business Development:

- Establish and maintain relationships with customers.
- Develop referrals from current customers and exploit cross-selling opportunities.
- Responsible for calling on customers and non-current customers to attract new business relationships and secure future potential business.

#### Customer Service:

- Maintain current relationships by attending to customer needs and seeking new opportunities within each relationship.
- Answer questions and resolves customer issues.

### OTHER FUNCTIONS

1. Responsible for forecasting and setting quotas and goals.
2. Maintain general knowledge of all financial products and services.
3. Maintain compliance with all banking laws, accounts, regulations, and bank policies and procedures.
4. Any other duties and/or projects as assigned by Management.

## REQUIREMENTS & QUALIFICATIONS

- Education: Associates degree in business, finance or related field.
- Experience: 1-3 years minimum financial planning and banking experience preferred; previous sales experience required.
- Specific Skills: Above average communication skills and proven sales ability.
- Specialized Knowledge, Licenses, etc.: Duly licensed broker and sales representative; qualified to sell securities, investments, and the Bank Products in the State of Ohio and the State of Michigan.
- Supervisory Responsibility, if any: None
- Working Conditions: Flexible hours necessary depending on appointments and meetings with customers; may require travel or non-traditional hours to meet with customers.

**Employee Name (Print):**

**Employee Signature:**

**Date:**