



Job Opening- Financial Services Advisor

First State Bank & Trust is a community bank with locations in northeast Kansas including Piper, Basehor, Tonganoxie, Lawrence, and Perry. We have an opening for a Financial Services Advisor with our Trust & Financial Services Department. This position will office out of our Investment Building in Basehor and will provide services throughout our market areas. Candidate must have the following: FINRA Series 7 and 66. Or Series 7, 63 and 65 and appropriate State insurance licenses.

SUMMARY

The Financial Advisor works directly with existing and prospective clients to address their financial, investment, insurance, tax and estate planning needs. Establishes value added relationships with customers by listening and understanding their financial needs and by offering solutions to those needs. The Financial Advisor is responsible for business development and client retention.

- Maintains the necessary skills, knowledge, training and applicable securities licenses required to serve clients in a financial advisory capacity.
- Recommends and manages investment solutions including individual stocks, bonds, mutual funds, ETF's, REITs, insurance, and annuity products, ensuring transactions are executed accurately.
- Collaborates and coordinates with customers' external advisors, including but not limited to, their attorneys, accountants, and insurance providers, to help deliver and implement a comprehensive wealth management plans.
- Advise both personal and commercial clients on retirement and savings plans.
- Cultivates and maintains relationships with referral partners, including attorneys and accountants, as well as engaging in community and business development activities.
- Builds relationships with co-workers for the purpose of cross delivering services to customers.
- Sets clear goals and executes a business plan to meet those goals.
- Keeps informed of industry trends, products and regulations and identifies opportunities for improvement of the solutions offered.
- Delivers responsive, high-quality service and ongoing support to meet client needs.
- Maintains compliance with all applicable bank, broker/dealer, State, and Federal regulations.
- Upholds a positive public image of the Bank to the community.

For consideration, please submit your resume to kathy@firststateks.com or stop by any of our locations and complete an Application.

Equal Opportunity Employer

