

## Lake Central Bank Financial Advisor

Lake Central Bank is seeking a professional, friendly and trusted Financial Advisor to join our team. We are looking for someone with excellent inter-personal, relationship building, communication and analysis skills to develop and maintain relationships with customers desiring investments in various securities outside of traditional bank products. As the Financial Advisor, you would be responsible for both maintaining and growing a current portfolio, as well as reviewing and understanding the customers' entire financial portfolio to best recommend services that match each individuals objectives and risk tolerance.

Questions or interested in applying? Contact Riley Fournier at [rfournier@lakecentral.bank](mailto:rfournier@lakecentral.bank) or 320-274-8216.

### Duties/Responsibilities:

- Maintain a current portfolio of customer investments held at our broker/dealer
- Grow the assets under management in approved products at our broker/dealer
- Grow client banking relationships by referring them to other financial products with Lake Central Bank and Lake Central Insurance Services
- Actively engage in networking opportunities and community events in order to build relationships and trust with current and prospective clients
- Handle both incoming and scheduled calls, as well as in-person meetings, to thoroughly understand the clients' financial goals, risk tolerance, investable income and timeline
- Responsible for understanding a wide variety of approved investment product options offered by the bank and broker/dealer in order to make recommendations for clients to consider
- Responsible for monitoring individual portfolios and respond to necessary service requests in a timely manner
- May participate in Bank's ALCO Committee
- May manage customer deposits placed in IntraFi's deposit programs

### Required Qualifications:

- Series 7 and 66 licenses
- 5+ years of experience as a Financial Advisor
- Excellent inter-personal skills in order to build relationships. This includes being an active listener in order to thoroughly understand client goals and effectively handle customer complaints
- Proven communication skills in order to effectively engage with clients or other service providers
- Ability to gather, read and retain information from a variety of sources in order to conduct market research, and study relevant financial documents useful in recommending effective financial plans
- Ability to analyze data, as well as other information, in order to advise clients on making sound financial decisions
- Thorough understanding of U.S and World economics
- Strong computer skills (Microsoft Office products, virtual meetings, cloud based applications, etc.)

### Preferred Qualifications:

- BA in economics, finance, accounting or a related discipline
- Involvement in community organizations in the Annandale or surrounding areas

Position Type: Full time

Location: Annandale, MN (main site) / Maple Lake, MN / Clearwater, MN

