FIRST STATE
BANK & TRUST

**Job Opening- Financial Advisor, Basehor, KS**

First State Bank & Trust is a community bank with locations in northeast Kansas including Piper, Basehor, Tonganoxie, Lawrence, and Perry. We are looking for an experienced Financial Advisor to join our Trust & Financial Services Department. Ideally, candidate will have Bachelor's degree or three to five years related experience or training; or equivalent combination of education and experience. Must also have 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.
- Offers personal investment products including individual stocks, bonds, mutual funds, ETF's, REITs, insurance, and annuity products and ensures that appropriate market transactions are executed.
- Collaborates and coordinates with customer's external advisors, including but not limited to, their attorneys, accountants, and insurance providers, to ensure a comprehensive wealth management plan is developed and implemented.
- Advises personal and commercial clients regarding retirement, savings, and other ERISA plans, including but not limited to 401Ks, SIMPLE IRAs, ESOPs, self-directed IRAs, HSAs and 529 Plans.
- Cultivates and maintains relationships with sources of new business prospects, including attorneys and accountants.
- Develops relationships with co-workers for the purpose of cross delivering services to customers.
- Sets goals and executes a business plan to meet those goals.
- Maintains up to date familiarity with investment product portfolio to ensure optimum marketing potential.
- Keeps informed of industry product trends and issues and identifies opportunities for improvement. Makes recommendations to management.
- Provides client relationship support and manages account servicing requirements.
- Maintains compliance with all applicable bank, broker/dealer, State, and Federal regulations.
- Upholds a positive public image of the Bank to the community.

To apply e-mail your resume to kathyy@firststateks.com

www.firststateks.com
Equal Opportunity Employer