

Helping customers with their financial needs and leading the way in innovation and responsiveness is the core of CoreFirst Bank & Trust's ("CoreFirst") mission. This philosophy, the CoreFirst Way, has guided the bank well for sixty (60) years and sets us apart from competitors.

Position Description:	Trust Portfolio Manager		
Reports To:	Senior Portfolio Manager	Department:	Trust and Investment Services
Supervises:	None	Classification:	Full-time, Exempt

🕒 Hours:	8:00 am to 5:00 pm Monday through Friday		
🏢 Location:	Headquarters	3035 SW Topeka Blvd. Topeka, KS 66611	
📌 Role:	The Trust Portfolio Manager is responsible for the portfolio of assigned accounts and marketing activities to increase the number of accounts administered.		
🔗 Apply:	www.corefirstbank.com/careers		
Essential Functions & Responsibilities:	<ul style="list-style-type: none"> ▪ Communicate with clients about their accounts, market conditions and economic and market trends ▪ Coordinate investments with administrators and their clients ▪ Establish client investment objectives, including risk tolerance, asset allocation, and cash requirements ▪ Monitor and implement investment models ▪ Monitor asset allocation relative to policy and goals ▪ Place and monitor trades ▪ Conduct ongoing research regarding securities and market and economic trends ▪ Create reports on investment-related performance and activity and review reports for accuracy ▪ Explain and differentiate between various investment opportunities ▪ Maintain relationships with third-party vendors ▪ Work with Operations department to complete projects ▪ Responsible for investment review portion of annual account review process ▪ Maintain records and files of all portfolio activity ▪ Other tasks as needed <p><i>Please note this description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.</i></p>		
Experience:	A minimum of three years of experience in equities and bond investments, investment research, brokerage business, or Trust Department Investments experience preferred		
Education:	<ul style="list-style-type: none"> • Bachelor's Degree in Business or related field preferred • CFA, CFP or other similar designation preferred 		

Skills & Abilities:	<ul style="list-style-type: none"> • Strong written, verbal, interpersonal and analytical skills, including ability to interact effectively with customers, employees and management are essential • Excellent interpersonal and organizational skills • The ability to plan and execute multiple projects and initiatives balancing department and organizational demands and resources is a must; work must be completed with quality and accuracy • Work in a team environment while promoting a positive attitude toward teamwork • Accept and respond to changes in the work environment • Willingness to pursue advanced certifications such as CFA, CFP, or AIF
Competencies:	<ul style="list-style-type: none"> ▪ Possesses detailed knowledge of economic theory and financial terminology. ▪ Possesses detailed knowledge of best investment practices. ▪ Maintains professional and confident demeanor. ▪ Communicates clearly and effectively. ▪ Demonstrates ability to translate financial language into layman’s terms for explanatory purposes. ▪ Possesses strong analytical and problem-solving skills. ▪ Demonstrates ability to make informed and logical management decisions. ▪ Is capable of applying economic theory and research to daily management activity. ▪ Exhibits ability to remain calm and think analytically during stressful situations.
Interpersonal Skills:	<p>A significant level of trust is required as this position is exposed to sensitive and confidential information which cannot be shared outside of the Department. Diplomacy, courtesy, and tact is required. Demonstrated ability to foster sound professional relationships with management is necessary.</p>

Physical Requirements:	<p>The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.</p> <p>While performing the duties of this job, the employee is regularly required to talk and listen to members and other employees. Physical activities include a combination of constant sitting, constant hand motion and occasional standing/walking. These activities are not necessarily performed to the same degree and combination every day.</p>
Travel:	<p>Travel is primarily local during the business day, although some local evening and weekend travel may be expected.</p>
Work Environment:	<ul style="list-style-type: none"> ▪ The majority of working hours will be spent in an office setting monitoring portfolios and meeting with clients. ▪ Some local travel for client meetings may be necessary. ▪ Workweeks often exceed the standard 40 hours. ▪ Work environment may be high stress in periods of economic downturn or market instability.
Other:	<ul style="list-style-type: none"> • Applicants must pass a drug screen and background checks • Internal applicants must be meeting the minimum requirements of their current job and submit a cover letter and resume via the employee portal • Applications received by XXX given first priority
CoreFirst Employment Practices:	<p>CoreFirst provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, CoreFirst Bank & Trust complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.</p>

I, _____, acknowledge by my signature below that I have received a copy of my position description.
Print Name

I have read and understand my job duties and responsibilities as ~~Trust Investment Officer~~ **Senior Trust Portfolio Manager**. I further understand that I am responsible for the satisfactory execution of all the duties described therein, under any and all conditions as described.

I can perform the essential function of this position with or without reasonable accommodations? _____ Yes _____ No

I certify that the information provided above is true and complete, and I understand that if the information provided above is false, it may result in denial of employment or dismissal.

Employee Signature

Date

HR Representative Signature

Date

~~October 2021~~ January 2022