

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 over sixty (60) years and sets us apart from competitors.

Position Description:	Program Manager		
Reports To:	Director of Trust and Investment	Department:	Trust and Investment Services
Supervises:	Investment Advisors, Sales Assistants	Classification:	Full Time - Exempt

🕒 Hours:	Mon-Fri 8am-5pm		
🏢 Location:	Headquarters	3035 SW Topeka Blvd. Topeka, KS 66611	
📄 Role:	The Program Manager is responsible for the initial start-up and on-going management of "BANK" Investment Services Program. The position has the primary responsibility for establishing and achieving the sales, revenue and expense goals of the Program and includes accountability for development and management of the sales/marketing programs, financial metrics and customer satisfaction measures. Responsible for compliance with applicable State and Federal securities and insurance laws and regulations. Responsible for the supervision of the Investment Advisors, and sales assistants. Serves as the liaison between the Bank's third party broker-dealer partnership and Bank.		
🔗 Apply:	www.corefirstbank.com/careers		
Essential Functions & Responsibilities:	<p>Sales Management/Measurement:</p> <ul style="list-style-type: none"> • In concert with the Director of Trust & Investment Services, and HR Department, design and implement sales compensation programs. • Recruit, train, motivate and retain registered representatives and track all sales and productivity of Investment Advisors to achieve maximum sales and revenue goals while controlling expenses. • Provide leadership, direction and support to Investment Advisors to include goal setting, performance measurement, performance feedback, selling assistance and sales coaching. • Develop, implement and monitor department's performance targets (revenue, net contribution, product development, quality assurance, compliance and budget issues etc.). • Partner closely with Retail Bank Branch Managers and staff and with other business units manager and staff by providing education about the benefits of the Investment Services Program to ensure multiple quality referrals. • Implement program marketing strategies and report regularly to the Director of Trust and Investment Services. • Continually seek out opportunities to maximize revenue and improve productivity recommending product offerings consistent with the Bank's objectives. • Communicate as needed with the third party broker dealer partner on all aspects of the Program. Fully responsible for establishing and maintaining a highly successful relationship with the third party broker dealer partner. <p>Risk and Regulatory Compliance:</p> <ul style="list-style-type: none"> • Monitor adherence to all regulatory requirements, laws, guidelines as determined by state, federal and regulatory agencies. • Ensure all Investment Advisors are aware of and consistently trained on compliance and regulatory issues. Conduct periodic reviews of policies, procedures and regulatory adherence. • Maintain required OSJ records. • In partnership with third party broker dealer, proactively manage customer complaints. • Conduct on-going due diligence on all products offered by the Program. 		

	<p>Customer Service & Communication:</p> <ul style="list-style-type: none"> Assurance customers are properly informed of product features and risk. Assure all communication materials are consistent with sound investment and financial principles. Establish and monitor measures of customer service satisfaction as delivered by all members within the Investment Services Department. <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:	<ul style="list-style-type: none"> Five or more years of investment sales experience in a bank or financial services industry. Investment sales program management strongly preferred. Five to seven years of sales supervision/leadership experience strongly preferred. Series 6, 7, and 65 licenses, life and disability insurance licenses for state of Kansas (or ability to obtain applicable license(s) upon hire).
Education:	<ul style="list-style-type: none"> Bachelor's Degree or equivalent work experience in investment sales and financial services field
Skills & Abilities:	<ul style="list-style-type: none"> Continuing professional education is required and development of advanced credentials and/or license/training is expected. Excellent verbal, listening and communication skills. Superior presentation skills. Strong attention to detail. Must be a self-starter, dependable, accurate in completing responsibilities with strong attention to detail and strong organizational skills. Strong interpersonal skills and ability to work with a wide range and diverse of Bank personnel and customers. PC skills and ability to use appropriate software and learn new programs as necessary, to include work processing, spreadsheets, and presentation/graphics software. Ability to work independently, set priorities and handle multiple tasks. Must exercise good judgement, accept responsibility and handle confidential information. Strong desire and ability to work with employees and customers in a cooperative, professional, and friendly manner. Able to work as a part of a team and with people of diverse backgrounds. Ability to accept and facilitate change and assume additional duties/projects as required. Travel between bank branches required. Must possess a valid driver's license, vehicle, and liability insurance.
Competencies:	<p>Adherence to CoreFirst Values: Respect, Communication, Integrity, Initiative, and Accountability. A secondary focus on internal and external Customers, Compliance, Ethics, Perseverance, and Time Management is also essential.</p>
Other Skills:	

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 or hear. The employee is frequently required to sit, stand, and walk. Some light physical effort required.</p>
Travel:	<p>Travel is primarily local during the business day, although some local evening and weekend travel may be expected.</p>

