

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:	Director of Trust & Investment Services		
Reports To:	CEO/President	Department:	Trust & Investment Services
Supervises:	Trust Administration Officers, Investment Portfolio Manager, Trust Executive Assistant, Investment Services Manager	Classification:	Full-Time, Exempt

🕒 Hours:	Monday-Friday 8:00am-5:00pm, other days and hours as needed		
🏠 Location:	Headquarters	3035 SW Topeka Blvd. Topeka, KS 66611	
📌 Role:	The Director of Trust & Investment oversees and provides guidance to the administrative and investment staff of the trust and investment services department, as well as to the retail investments team.		
🔗 Apply:	www.corefirstbank.com/careers		

Essential Functions & Responsibilities:

- Establishes overall direction, structure and strategic initiatives for the Trust & Investment Services.
- Coordinates all aspects of trust policy and procedures.
- Primary party responsible for the annual budget and business plan for the Trust & Investment Services department. Includes individual officer sales, income, and production goals as well as department growth, revenue, expenses, profitability, and other key performance indicators.
- Serves as the sales manager and service leader for the department. Responsible for the supervision, performance management, and development of staff.
- Will have some individual sales and income objectives, but will administer a limited number of accounts.
- Develops and implements the marketing and public relations strategies and programs necessary to achieve an increasing volume of trust business.
- Evaluate and recommend fee structures, including applicable fee discounts, fee waivers and fee bundling.
- Leads committee to review /decide on acceptance or rejection of various types of trust business/accounts.
- Establishes service-level expectations and monitoring to evaluate individual and overall team performance.
- Ensures solid processes and formal procedures are in place resulting in accounts being administered and serviced consistent with the trust documents and clients' expectations.
- Works closely with and collaborates with Trust Operations Manager and operations staff to ensure efficient, accurate, and high quality service is achieved. This includes maximizing the use of technology and meeting service level commitments.
- Directs and collaborates with Trust Investment Portfolio Manager the analysis and review of investment options and sets (or recommends) investment policy and guidelines for the purchase and sale of securities.
- Chairs the monthly Trust Investment Committee which reviews and approves many aspects of the Trust Department's activities including account reviews, distributions, administration exceptions, investment performance/compliance, economic outlook, and more.
- Responsible for monthly production/presentation of Board Reports relating to Trust & Investment Services.
- Risk manager and among primary parties responsible for preparation before, main contact during, and responses/corrective actions resulting from regulatory, risk assessment, and audit activities.
- Management of key software and other third-party service providers.
- Be active in the community serving on boards, doing public speaking and maintaining relations with CPA firms, Law firms and Life Underwriting agencies.
- This is a senior officer level position for the Bank. Will serve on various Bank-wide committees including Administrative Committee, IT Steering, Compliance, ESOP/401K, and specific project teams.

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.

Experience:	5-7+ years of sales and trust/fiduciary work experience in a bank or financial services industry, including sales management. 7-10+ years of leadership experience required.
Education:	Bachelor's Degree or equivalent work experience in trust administration and investment sales. Master of Business Administration (MBA) or Juris Doctor (JD) preferred.
Skills & Abilities:	<ul style="list-style-type: none"> • Enthusiastic, persuasive, and empathic verbal, listening and communication and presentation skills. • Proactive, self-motivated and competitive drive to get things done. • Disciplined decision-making, exercise good judgment, and accepting of responsibility. • Attention to detail and accuracy in completing responsibilities. • Strong organizational skills and ability to set priorities and handle multiple tasks. • Strong interpersonal skills and ability to work with a diverse and wide range of Bank personnel and customers. • Service oriented leader with desire to work with employees and customers in a cooperative, professional and friendly manner. • Ability to work independently, as well as part of a team. • Problem solver and ability to accept/facilitate change and assume additional duties/projects as required. • PC skills and ability to use appropriate software and learn new programs as necessary, to include word processing, spreadsheets, and presentation/graphics software. • Travel between bank branches and markets required. Must possess a valid driver's license, vehicle, and liability insurance.
Competencies:	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.

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:	Travel is primarily local during the business day, although some local evening and weekend travel may be expected.
Work Environment:	This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, copy machines, filing cabinets, and fax machines.
Other:	<ul style="list-style-type: none"> • Applicants must pass a drug screen and background checks • Internal applicants must meet the minimum requirements of their current job and submit a cover letter and resume via the employee portal
CoreFirst Employment Practices:	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.

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 _____ (title). 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

Revised