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:	**Portfolio Manager I**		
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:	Topeka HQ and/or Olathe Branch and/or Lenexa Branch	3035 SW Topeka Blvd. Topeka, K S 66611 11875 S. Ridgeview Rd Olathe, KS 666061 16201 W 95th St. Lenexa, KS 66219
Role:	The Portfolio Manager I is responsible for assisting in the management of client portfolios. This role is expected to enhance the relationship between clients, Trust Officers and Portfolio Management, to meet with clients in order to help build strong, comprehensive relationships, ensure proper asset allocation, and confirm that appropriate investments are being used in client portfolios. This person will play an integral role in the day-to-day management of client accounts. The Portfolio Manager I will be expected to assist with financial planning and/or investment research to support marketing/sales activities. Depending on the skill set, day-to-day activities may be more focused on the client relationship, financial planning, asset gathering and marketing/sales, or more focused on investment research & portfolio management activities.	
Apply:	www.corefirstbank.com/careers	
Essential Functions & Responsibilities:	▪ Communicate with clients about their accounts, investments, market conditions, economy, etc. ▪ Establish client investment objectives, including risk tolerance, asset allocation, and cash requirements ▪ Explain and differentiate between various investment opportunities ▪ Conduct Financial Planning and/or investment research, analysis, & management. ▪ Coordinate investments/planning with administrators, clients, and prospective clients ▪ Communicate well with Trust Officers, Operations, and other key referral sources within the Bank ▪ Communicate well and maintain relationships with third-party vendors/partners ▪ Responsible for daily investment decisions and execution of trade requests ▪ Monitor asset allocation relative to policy and goals ▪ Monitor and implement investment models ▪ Create reports on investment-related performance and activity and review reports for accuracy ▪ Responsible for investment review portion of annual regulatory account review process ▪ Place and monitor trades for completion (see bullet 8 above) ▪ Maintain records and files along with other compliance requirements ▪ Work with Client and Trust Officer to create comprehensive wealth strategies for the Client ▪ Other tasks as needed *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:	Wealth Advisor experience preferred. Three plus years of experience in investment research & analysis, financial planning, portfolio management, brokerage, Trust Department or similar financial background is preferred. Any experience with business development or client relationships is helpful.	

Education:	• Bachelor's Degree in Business, Finance, Economics, Accounting or related field preferred • CFP, CFA, or M.B.A. are preferred but not required. Willingness to pursue CFA, CFP, or M.B.A. is strongly encouraged • Designations such as the CAIA, AIF, ChFC, CPA, or other similar designations are also favored, but not required.
Skills & Abilities:	▪ Financial planning and/or investment research & portfolio management skills ▪ Strong written, verbal, interpersonal and analytical skills, including ability to interact effectively with customers, employees and management are essential ▪ 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
Competencies:	▪ Ability to handle a wide variety of tasks: client-related, investments, planning and operational ▪ Communicates clearly and effectively ▪ Demonstrates ability to communicate financial vocabulary into common terms for explanatory purposes ▪ Maintains professional and confident demeanor ▪ Demonstrates ability to make informed and logical decisions ▪ Exhibits ability to remain calm and think analytically during stressful situations ▪ Possesses detailed knowledge of economic theory and financial terminology ▪ Possesses detailed knowledge of best investment practices ▪ Possesses in-depth financial planning acumen ▪ Possesses strong analytical and problem-solving skills ▪ Is capable of applying economic theory and research to daily management activity
Interpersonal Skills:	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.

Physical: Requirements:	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. 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.
Travel:	Travel is primarily local during the business day, although some local evening and weekend travel may be expected. For applicants outside of the Topeka area, some travel to Topeka on a weekly basis is expected.
Work Environment:	▪ The majority of working hours will be spent in an office setting monitoring portfolios and meeting with clients. ▪ Workweeks may exceed the standard 40 hours.
Other:	• 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:	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 **Portfolio Manager I**. 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.

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Employee Signature Date HR Representative Signature Date

Revised January 2025 KR