

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:	Associate 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 and/or Olathe Branch	3035 SW Topeka Blvd. Topeka, K S 66611 – Primary Location with possible option to work from Olathe office after training period, approximately after 1 year. 11875 S. Ridgeview Rd Olathe, KS 666061	
📌 Role:	The Associate Trust Portfolio Manager is responsible for assisting with the day-to-day management of client accounts, helping with investment research & analysis, and supporting marketing activities to increase the number of accounts administered.		
🔗 Apply:	www.corefirstbank.com/careers		
Essential Functions & Responsibilities:	<ul style="list-style-type: none"> ▪ Create reports on investment-related performance and activity and review reports for accuracy ▪ Monitor asset allocation relative to policy and goals ▪ Conduct ongoing research regarding securities and market & economic trends ▪ Manage fixed income maturities and reinvestment ▪ Purchase and sale Treasuries and CDs for client accounts ▪ Work with Operations department to complete projects ▪ Maintain records and files of all portfolio activity ▪ Monitor and implement investment models ▪ Complete stocks, ETF, & Mutual Funds trades to meet client objectives ▪ Monitor trades for completion ▪ Maintain relationships with third-party vendors ▪ Communicate with certain clients about their accounts, market conditions and economic and market trends ▪ Coordinate investments with administrators and their clients ▪ Responsible for investment review portion of annual account review process ▪ 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:	College, course work, or work experience that has provided a basic understanding of equities, bond, ETF, and/or Mutual Fund investments.		
Education:	<ul style="list-style-type: none"> ▪ Bachelor's degree in business or related field preferred ▪ Goal of obtaining CFA Charter or CFP 		

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 ▪ Outstanding 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, CAIA, CHF, or AIF
Competencies:	<ul style="list-style-type: none"> ▪ Ability to handle a wide variety of tasks: client-related, investments, and operational ▪ Communicates clearly and effectively ▪ Demonstrates ability to translate financial language into layman’s 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 strong analytical and problem-solving skills ▪ Is capable of applying economic theory and research to daily management activity
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 resume via the employee portal
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 **Associate 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

Revised 4/2026 KR

