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Institution Services

First National Bank

# FIRST NATIONAL BANK OF GRANT PARK AND

# LPL FINANCIAL INSTITUTION SERVICES

Position Opening

| | |
|---|---|
| Division / Department | **Financial Services** |
| Job Title | **Financial Consultant** |

## OVERVIEW

- The role of the Financial Consultant is to establish value-added relationships with customers, to understand their financial needs and to offer solutions for those needs.

- The needs that Financial Consultants should be able to meet generally are growing and protecting assets and include the following:
  - Funding for a secure retirement
  - Education Funding for child(ren) or grandchild(ren)
  - Growth above inflation and taxes
  - Protection of assets from unexpected / large scale healthcare expense
  - Protection of assets from estate taxes

- The business model the consultant should use should include the following critical components:
  - Prospecting within the financial institution by establishing relationships with customer contact associates to find appropriate customers and introduce them.
  - Engaging in activities that enable access to those customers who may not frequently use the branch system.
  - Prospect outside the financial institution in order to bring in new customer relationships.
  - Sell effectively by establishing relationships with customers, finding their needs and then offering appropriate solutions in a compelling way so the customer sees the value, understands the features and benefits and purchases the solutions.

## QUALIFICATIONS

- In order to succeed, the candidate for this role must have the following interpersonal traits:

  Character – Must display traits such as honesty, work ethic and team-orientation

  Chemistry – Must fit with the social and cultural values of the institution.

  Competence – Must have the relevant knowledge and required skills to execute the business model outlined above.

- Licenses

  FINRA Series 6 or Series 7

  FINRA Series 66 (preferably) or Series 63

  Life and Health Insurance Designation

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orking hours. Off-site training may be required. The following are may appear elsewhere in this description: excellent verbal and written communication skills; vision; sufficient mobility to perform the essential functions of the position. There will be occasional travel.

**INTENT AND FUNCTION OF POSITIONS DESCRIPTIONS**

Job Openings assist the financial institution in ensuring that the hiring process is fairly administered and that qualified employees are selected. From time to time, the best candidate for the position has excellent transferable skills and significant upside potential but lacks direct experience or licenses. In these cases, LPL Financial recommends the candidate be seriously considered. Our rationale is that these candidates have the potential over the long-term to outperform other candidates who may be able to produce immediately but not continue to grow.

All openings have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the Bank.

Job openings are not intended and do not create employment contracts. The Bank maintains its status as an at-will employer.