

Crews Bank & Trust

Job Description

Job Title: Business Development Officer – Trust division

Office: Sarasota

Overview:

Responsible for generating, managing and maintaining Trust account relationships. Interviews and counsels individuals on estate planning, calls on prospective accounts, maintains strong network of COI's, develops new investment and future business client relationships, and administers accounts.

Complies with all federal and state laws and regulations as well as internal policies and procedures of Crews Bank & Trust including the Bank's Program for Community Reinvestment (CRA), and the Bank's Code of Conduct. All employees are expected to comply with these responsibilities as they relate specifically to their jobs.

Job Responsibilities:

- Calls on prospective accounts; identifies prospects in and out of the bank; develops current and future business relationships; manages relationships with current clients and future business clients. Target area: Sarasota/Manatee/Arcadia
- Works with established commercial lending team and branch network in developing referrals to Trust and Investment Management area. Prepares and delivers internal training on Trust topics to motivate and educate staff, explain the value of Trust services, and expand referral network.
- Utilizes interpersonal and sales skills to build relationships with referral sources, such as Attorneys, CPAs and community organizations.
- Assembles the proper professionals needed (i.e. Attorney, CPA, Trust staff) in order for clients to meet their life goals and objectives.
- Provides superior quality service to develop in-depth understanding of client needs, preferences and overall wealth.
- Dedicates time needed to cultivate potential relationships and represent bank at community events.
- Coordinate with other branches and departments within Crews Banking Corporation and maintain strong working relationship with Marketing, Lending and Retail areas.
- Maintains knowledge of regulatory, compliance and legal issues related to the Trust industry; and adheres to all bank policies and procedures.
- Commit to personal development of knowledge and skills on an ongoing basis in order to better serve the customer and increase satisfaction in job position. Willingness to apply new techniques and technology to adapt to changing environment.

Background Skills and Requirements:

- Results oriented and proven ability to produce satisfactory levels of new business
- Desire and willingness to work in a collaborative, flexible and team oriented work environment.
- Professional, thorough and organized with strong follow-up skills
- Possesses initiative and professional knowledge to provide options for customers using a consultative approach

EOE / Vet / Disability

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Job Description

- Excellent communication skills with ability to discern and relate to individuals with differing needs
- Knowledgeable about all products and services offered by the bank

Education and Experience:

- Associates or Bachelor's degree in Business or related field, required
- Minimum 5 years work experience in planning-related, high net worth sales
- Management skills and leadership experience a plus

Note the Following:

- All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
- Individuals who cannot perform some of the requirements because they pose health or safety risks to themselves or other employees might be excluded from this position.
- This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to perform other reasonably related duties as assigned.
- Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the incumbent is to possess the abilities or aptitudes to perform each duty proficiently.
- This document does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.
- Must be able to lift 25 pounds.
- Are you able to perform these job duties as outlined? Yes ___ No ___
- If not, are there accommodations the Bank can make so that you can perform the duties of this job? Yes ___ No ___

Please describe below:

Employee Signature

Date

Supervisor Signature

Date