



**Main Street Advisory Group**

**A Division of Marion County Bank**

**JOB TITLE:** Branch Associate, Main Street Advisory Group

**SUMMARY:**

Located in Pella, Iowa, Main Street Advisory Group (MSAG) has been serving clients in Iowa and around the U.S. for more than 20 years with financial advisors who provide full-service financial, investment and retirement planning. From individuals and families to businesses and nonprofits, MSAG specializes in helping clients identify short and long-term goals to develop plans for working toward achieving their vision for the future. The Branch Associate's primary responsibility is providing excellent service to current clients and potential clients by coordinating client communication and providing support to the financial advisors. This is accomplished while adhering to all securities compliance and regulations.

**PRINCIPAL DUTIES AND RESPONSIBILITIES:**

- Manage the client onboarding and outreach processes
- Prepare client meeting summaries
- Maintain client accounts and records
- Track department expenses and supplies.
- Follow all FINRA/SEC regulations and guidelines
- Internal auditing of processes and procedures
- Create a welcoming environment for clients in the office
- Ability to effectively engage with clients over the phone ensuring clear and professional communication.

**SKILLS/QUALIFICATIONS:**

- Proficient in managing office tasks, organizing schedules, maintaining records and ensuring efficient workflow to support financial advisors
- Excellent verbal and written communication skills
- Ability to work well with clients with a service-oriented attitude
- Analytical skills/math skills
- Effective time management skills and ability to multitask
- Ability to create and maintain projects independently

**EDUCATION AND EXPERIENCE:**

- High school or GED required
- Post-secondary degree preferred
- Administrative support and/or office management experience preferred
- Customer Relationship Management (CRM) software experience preferred

**PHYSICAL DEMANDS:**

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 accommodation may be made to enable individuals with disabilities to perform the essential functions.

While performing the responsibilities of the job, the employee is required to talk and hear. The employee is often required to sit and use their hands and fingers, to handle or feel. Vision abilities required by this job include close vision.

*The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.*

*Marion County Bank provides equal employment opportunity to all individuals regardless of their race, color, creed, religion, gender, age, sexual orientation, national origin, disability, veteran status, or any other characteristic protected by state, federal, or local law.*

**TO APPLY:**

Qualified candidates can send or email a cover letter and resume to:

Klint Korver, Marion County Bank

800 Main Street, Pella, IA 50219

[kkorver@marioncountybank.com](mailto:kkorver@marioncountybank.com)

*No phone calls please*