CommunityBanc, Inc.

Wealth Management Financial Advisor

Summary:
Manages and retains client relationships. Assists department team members in performing investment research and securities transactions.

Essential Duties and Responsibilities: include the following. Other duties may be assigned.

- Provides advice to current client relationships and develops new client relationships.
- Manages investment portfolios for assigned accounts.
- Research different investment products including but not limited to stocks, bonds, mutual funds, annuities, qualified retirement plans, and various insurance products.
- Assists with stock and mutual fund trading.
- Manages existing qualified retirement plan (401K) relationships (ie. Contributions, Enrollment Meetings, etc.).
- Assists Bank in deepening bank client relationships by offering non-traditional banking alternatives.
- Stays current with continuing education requirements necessary for any professional designations.
- Follows and supports the Company's policies and procedures accurately.
- Positively represents the Company's culture and values.
- Achieves annual goals as assigned.
- Completes annual required regulatory and cybersecurity curriculums as assigned.

Supervisory Responsibilities

This job has no supervisory responsibilities.

Education, Training and/or Experience

Bachelor's degree (B.A.) from four-year college or university; two years' experience in investments or related field; previous sales or customer service experience.

Certifications, Licenses, Registrations
Valid Driver's License
FINRA Series 7 (preferred, but not required)
FINRA Series 65 or 66 (preferred, but not required)

OPPORTUNITY:

- **Potential for Transition and Sign-On Bonus.**
- **Robust branch referral network covering the Licking and Muskingum County Markets.**
- **Industry-leading recurring commission and fee income compensation plan.**
- **Access to trust, investment and retirement plan products and services.**
- **Full suite trading, research, portfolio modeling and financial planning software.**
- **Expense Reimbursement**
- **Full Benefits Package**

Please feel free to confidentially contact Ron Davis, SVP-Sr. Financial Officer, at 453-0620 for more information.