



JOB DESCRIPTION

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| <u>POSITION TITLE:</u> | Managing Director |
| <u>SUPERVISOR'S TITLE:</u> | Group Managing Director |
| <u>DEPARTMENT:</u> | Sales |
| <u>EMPLOYMENT STATUS:</u> | Exempt |

ESSENTIAL DUTIES & RESPONSIBILITIES:

- ❖ Responsible for sourcing and developing prospects and new clients and assisting in the sale of all lending, deposit, cash management products and services to those prospects and new clients.
- ❖ Responsible for developing sales strategies and maintaining and expanding referral sources.
- ❖ Gathering and maintaining prospect and client data base.
- ❖ Maintaining marketing materials to be used in the selling process.
- ❖ Participates in community organizations and activities.
- ❖ Assists prospective customers in the on-boarding process.
- ❖ Sourcing and developing prospects and new clients through active calling efforts and assisting in the sale of products and services to those prospects and new clients.
- ❖ Development of sales strategies to maintain and expand referral sources and new business opportunities.
- ❖ Responsible for maintaining ticklers to ensure documentation and covenants are kept up to date
- ❖ Provide introduction of prospects to RM and Management team upon opportunities having been qualified as priorities to pursue.
- ❖ Partners with branch staff to support servicing and retention of existing clients and on boarding of new clients.
- ❖ Participates in weekly sales pipeline meetings to provide an overview of individual and market sales opportunities.

JOB RELATED QUALIFICATIONS:

Knowledge/Skills/Abilities

- ❖ At least 5 years of relevant experience. Exhibits a history of competency in prospecting, developing, servicing, deposit accounts as well as structuring a wide range of secured and unsecured commercial loans, including complex transactions.
- ❖ Ability to handle the most demanding and sensitive client relationships.
- ❖ Ability to sell value of a relationship over price. Capable of handling difficult negotiations, including in the area of loan documentation
- ❖ Independent thinker and self-starter.
- ❖ Solid credit skills.
- ❖ Responsible for cross-selling all product lines.
- ❖ Computer skills to include use of Microsoft Office products and other programs as required.
- ❖ Excellent written and verbal communication skills, attention to detail and follow-through.

Education/ Licenses/ Work Experience

- ❖ Bachelor's Degree in Business or Finance.
- ❖ Five to seven years of branch or retail experience.
- ❖ Strong knowledge of branch and retail policies, practices and procedures.

Physical Demands:

- ❖ The employee must be able to remain in a stationary position for sustained periods of time. The person in this position needs to occasionally move about inside the office to access file cabinets, office machinery.
- ❖ The employee is occasionally required to raise objects up to 50 pounds from a lower to a higher position, or moving objects horizontally from position to-position with, and/or to bend body downward and forward, extending hands and arms in any direction to access files.
- ❖ Consistent use of a computer and other office machinery is required, such as a calculator, copy machine, and computer printer. Making substantial and repetitive movements (motions) of the wrists, hands, and/or fingers.
- ❖ Close visual acuity is required to perform activities such as: preparing and analyzing data and figures, transcribing, viewing a computer terminal, extensive reading.
- ❖ While performing the duties of this job, the employee is regularly required to communicate verbally to clients.
- ❖ The person in this position must stay awake and alert during assigned work time.

Work Environment:

Generally works in an office environment but may occasionally be required to perform job duties outside of the typical office setting. Local travel by car is required for client meetings.