THE MILFORD BANK

Position: **Operations & Client Relationship Specialist**
Department: **TMBFS - Financial Services**
Status: **Part-time Non-Exempt**
Grade: **7**

This position provides administrative and marketing support to the Senior Financial Advisor (SFA). It includes day to day administrative functions, assisting the SFA in marketing efforts, working with branch employees to build stronger relationships for referrals and developing business opportunities for the program to reach sales targets.

The Operations & Client Relationship Specialist is expected to promote The Milford Bank and TMBFS within the communities they serve. Must demonstrate extraordinary client services ability, attention to detail, self-confidence, integrity and honesty.

The incumbent must successfully complete initial and on-going training programs, including online courses, to maintain a comprehensive understanding of pertinent topics as the Bank and OSAIC deems necessary from time to time.

Primary Responsibilities Include

- Functions within scope of authority and expertise to provide the highest possible level of customer service and to increase the productivity and profitability of the Bank's TMBFS operations.
- Maintains high ethical standards while performing all duties according to internal policies and procedures and within prescribed legal, regulatory and compliance guidelines.
- Client relationship management, including ongoing client contact and communications.
- Client services, including preparing for client meetings, phone calls to set appointments, handling client issues and follow-up.
- Manage marketing efforts including mailings and outbound phone calls, assist with TMBFS social media marketing efforts. Initiates marketing programs and referral training for bank employees.
- Maintains and updates client files in an accurate and compliant manner; processes time-sensitive paperwork.
- Works closely with the SFA to learn the bank and TMBFS culture.
- Tracks referrals and maintains department/SFA calendar.

Other Responsibilities Include

- Operate as a team player to perform other tasks to ensure the success and ongoing effectiveness of department operations.
- The above is a description of the ordinary duties of the position. It should be expected that, from time to time, other duties both related and unrelated to the above may be assigned and, therefore, required to maintain the bank's service and work standards.

Position Requirements

- College degree or its equivalent through specialized course work and related work experience
- Valid Connecticut driver's license to enable necessary travel between branch offices
- Proficient with Microsoft Office applications including Outlook, Excel and Word
- Acquire proficiency in all back-office software including, but not limited to, the CRM program, new account programs, and marketing programs
- Able to work flexible work schedule to support client needs and special projects and to assist at special events
- Strong written and verbal communication skills
- Motivated to seek out answers, generate ideas, and develop new skills
- Must be organized, detail-oriented, and able to work effectively in a team environment and independently to prioritize and complete daily work

Supervisory Scope

Not applicable

Interested applicants may apply to: Careers@Milfordbank.com