Waukesha State Bank

151 E. St. Paul Ave. P.O. Box 648 Waukesha, WI 53187-0648
Phone: (262) 549-8506 Fax: (262) 574-4209 E-Mail: hr@waukeshabank.com

Waukesha Investments
Licensed Investment Representative

Hours:	**Full Time**
Job Duties:	• Facilitate the sales and service of securities, annuities, registered investment advisory products and life insurance to qualified buyers • Coordinate sales appointments, presentations and all necessary sales and account servicing documentation • Meet established activity and production goals • Nurture effective relationships with bank personnel, provide referral training, and support marketing and service to bank clients • Identify and react effectively to outside sources of funds, new money sales and internal and external networking opportunities. • Comply with all the rules, regulations and policies of Cetera Investment Services, LLC, Waukesha State Bank, Waukesha Investments and all State and Federal securities regulators and self regulatory organizations
Job Qualifications:	• 3 -5 years of experience in commissioned investment sales, preferably in a retail bank environment • Series 66 and 7 Licenses and State Life & Health License • Strong production and customer service history • Accuracy, attention to detail and consistent follow-through • Strong work ethic and the ability to work independently • Ability to handle multiple tasks and priorities • Excellent communication and presentation skills • Desire to work in a community bank and represent Waukesha State Bank in a professional and ethical manner

If you have an interest in or would like more information about this position, contact Human Resources at (262)549-8506 or HR@waukeshabank.com.

Excellent Benefits • Equal Opportunity Employer