

# ADVANTAGE TRUST COMPANY - POSITION DESCRIPTION

**Job Title:** Investment Officer  
**Location:** Salina, KS  
**Company:** Advantage Trust Company  
**Job Type:** Full-Time

## About Us:

Advantage Trust Company is a locally owned, independent trust company based in Salina, Kansas, serving families, individuals, and institutions with fiduciary integrity and personalized financial solutions. With a dedicated team of 12 professionals, we provide tailored trust, estate, investment and wealth management services that reflect the values and goals of our clients.

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## Position Summary:

We are seeking an Investment Officer. This individual will be responsible for assisting in the management and implementation of Advantage Trust Company's overall investment function. The ideal candidate will be proactive, analytical, and a team player with a strong grasp of fiduciary principles and portfolio management or have the willingness to learn such from our current team members.

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## Key Responsibilities:

- **Portfolio Oversight:** Manage investment accounts with strategies aligned to clients' goals, timelines, and risk profiles.
  - **Client Advisory:** Serve as a trusted advisor, providing thoughtful investment and financial planning guidance to individuals, families, and institutions.
  - **Trust Administration Support:** Collaborate with trust officers to ensure investment strategies align with trust provisions and fiduciary standards.
  - **Investment Research:** Monitor market conditions and perform due diligence on investment options to inform asset allocation and rebalancing decisions.
  - **Relationship Building:** Strengthen existing client relationships and assist in the development of new business through referrals and community involvement.
  - **Regulatory Compliance:** Ensure adherence to fiduciary, regulatory, and internal investment policies and procedures.
  - **Cross-functional Collaboration:** Work closely with internal team members to deliver consistent, high-quality service.
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**Qualifications:**

- Bachelor's degree with preference in Finance, Business, Economics, or related field. We will also be willing to provide additional job specific education and access to certifications as may be deemed helpful for the position.
  - Preference of 3–5 years of experience in investment management, wealth advisory, or trust services. However, we are willing to train the right person.
  - Excellent communication, interpersonal, and analytical skills
  - Strong organizational abilities and attention to detail
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**Why Join Us:**

- Local Impact: Make a meaningful difference in the financial lives of clients in Salina and surrounding communities.
  - Collaborative Team: Work in a supportive, team-oriented environment with experienced professionals.
  - Growth Opportunity: Be part of a growing company where your voice and expertise are valued.
  - Benefits: Competitive salary, 401(k), health benefits, continuing education support, and a healthy work-life balance.
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**To Apply:**

Please submit your resume and a cover letter to [mdavidson@firstbankkansas.com](mailto:mdavidson@firstbankkansas.com). We look forward to hearing from you.