

Chain Bridge Bank, N.A.



Position: Wealth Planner

Available: Immediately

Company: Chain Bridge Bank, N.A.

Reports to: Trust & Wealth Department Manager

About Chain Bridge Bank, N.A.

We are a nationally chartered but privately held commercial bank headquartered near Washington, D.C. We deliver exceptional banking experiences through attentive personal service, leading-edge technology and a fortress balance sheet.

In addition to banking services, we provide trust and estate services, asset custody, investment management and financial planning with a fiduciary charter from the Office of the Comptroller of the Currency.

The Chain Bridge Bank, N.A. Trust and Wealth Department offers clients a roadmap for financial success, an appropriate allocation for their investments, and full use of internal and external resources to achieve their objectives. Our investment approach is to earn clients their fair share of market returns through low cost, broadly diversified index funds.

Compensation

The Wealth Planner will receive a competitive salary, a comprehensive benefits package and the opportunity to participate in the Chain Bridge Bank, N.A. Incentive Compensation Plan. The incentive plan rewards outstanding bank-wide financial and risk management performance based on key metrics.

Position Details

We are seeking a Certified Financial Planner™ to develop our wealth management and financial planning practice. This person will cultivate and service clients such as business founders, executives and families.

As a fiduciary, we provide wealth management on a fee-only basis and include financial planning for high net-worth relationships. Clients can pay for standalone financial planning as well.

The Wealth Planner is required to:

- Serve as the primary relationship manager for financial planning and wealth management clients.
- Maintain knowledge of the client's financial planning and investment needs and objectives.

- Provide technical planning and investment expertise to clients.
- Make business development efforts individually and with colleagues.
- Collaborate with trust officers to set investment objectives for trust accounts.
- Adhere to policies and procedures involving account pre-acceptance, administration and review.
- Regularly review the client relationship and account documentation to ensure it is complete and accurate.

The Wealth Planner should be a Certified Financial Planner™ or be working toward the designation.

Other required qualifications include business development experience in financial services, exceptional verbal and written communication skills, attention to detail, strong work ethic, knowledge about financial markets and experience with financial planning software.

Compliance

The Wealth Planner must comply with all applicable laws and adhere to Chain Bridge Bank, N.A.'s policies to maintain a professional and respectful workplace.

The role will also be responsible for upholding internal policies that focus on risk management, safety, and compliance with regulatory standards. Adherence to all federal and state banking regulations and maintaining client confidentiality according to legal requirements and company policies are mandatory. The performance evaluation will consider compliance with these policies and the completion of required consumer compliance courses.

How to Apply

To apply, send a cover letter and resume to hr@chainbridgebank.com.

We look forward to reviewing your application and introducing you to the Chain Bridge Bank, N.A. Trust & Wealth team.