



## Position Description

**Position Title:** Assistant Vice President (AVP) - Asset Liability Management (ALM)  
**Department:** Investments  
**Reports To:** Vice President – ALM  
**Supervises:** Not Applicable  
**Salary Grade:** [Click or tap here to enter text.](#)  
**FLSA Status:** Exempt  
**EEO Category:** Professional

### POSITION OVERVIEW:

Supports and markets the asset liability management (ALM) product offered by the Bank to financial institutions in the Midwest. Produces accurate and insightful financial analysis that stimulates strategic discussions and builds relationships through education and exemplary client support including accurate reporting, analysis and clear communication of all ALM components.

### POSITION FUNCTIONS\*

Percentage	Position Functions
60%	<b>Sales &amp; Relationship Management</b> <ul style="list-style-type: none"> <li>• Conduct pre-sales call analysis, customer fit assessments and development of sales materials</li> <li>• Conduct in-person sales calls and/or webinars to demonstrate product features.</li> <li>• Engage with potential customers to address questions about program functions and features.</li> <li>• Conduct sales presentation for additional investment operations programs, namely Bond Accounting and Safekeeping.</li> <li>• Maintain Client Relationship Management (CRM) system information for assigned sales opportunities and lead efforts to take opportunity through the sales process.</li> <li>• Meet sales goals.</li> <li>• Assist in developing sales and marketing plans related to ALM Driver, Bond Accounting, and Safekeeping.</li> <li>• Work with existing customers to answer any questions about the modeling functions.</li> <li>• Work with the vendor to understand model functionality and troubleshooting.</li> </ul>
20%	<b>Consulting</b> <ul style="list-style-type: none"> <li>• Demonstrate a thorough knowledge of the ALM model and process functionality.</li> <li>• Maintain knowledge of regulatory and industry related issues.</li> <li>• Personalize presentations and services, training and product support for customers in the areas of:               <ul style="list-style-type: none"> <li>• ALM concepts</li> <li>• ALM model layout, reports, functions, and tools</li> <li>• Scenario assessments</li> </ul> </li> <li>• Conduct webinars and presentations as educational opportunities for customers.</li> <li>• Generate fee based consulting services for project work and advanced modeling needs.</li> </ul>
20%	<b>Data Analysis</b> <ul style="list-style-type: none"> <li>• Lead implementation activities for new customers related to bank data acquisition, assumption creation, data reconciliations, model settings and new user orientation.</li> </ul>

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	<ul style="list-style-type: none"> <li>• Evaluate customer data to determine cause for bank result changes and to be prepared to discuss results with clients.</li> <li>• Compile information from client base to identify trends and averages to be used for client insight and assessment purposes.</li> <li>• Develop or assess 'what-if' model scenarios for completeness and implications of results.</li> </ul>
NA	Other duties as assigned to meet the needs of the organization.

*\*Position Functions for this position consist of all items listed under any category that make up 5% or more of the position duties. This position description is subject to change without notice.*

## MINIMUM QUALIFICATIONS

•	Bachelor degree in business, accounting, economics or other related field or an equivalent combination of education and experience sufficient to perform the position functions of the job.
•	Six or more years of banking and financial experience. Two or more year ALM modeling experience.

## REQUIRED SKILLS

- Exercises judgment within broadly defined practices and policies.
- Makes sound decisions based on analysis, discussion, experience and judgment.
- Demonstrated team player with active participation in meetings.
- Demonstrated sales processes and techniques.
- Strong planning and project management skills.
- Strong ability to transition efficiently from working independently to working collaboratively.
- Anticipates emerging and future trends accurately based on broad knowledge and perspective.
- Strong written and verbal communication skills, with ability to communicate at all levels of the organization including customer executives and board members.
- Develops and maintains interpersonal relationships.
- Expert level organizational and problem solving skills, attention to detail, and the ability to balance multiple priorities.
- Advanced use of Microsoft products, including Word, Outlook and Excel, and related industry applications.
- Valid driver's license.

**Responsible to appropriately protect the confidentiality, security, and integrity of the organization's systems and data as well as client data.**

## PHYSICAL REQUIREMENTS

While performing the duties of this job, the team member is required to have ordinary ambulatory skills; ability to stand or sit, bend or stoop, and manipulate (lift, carry, move) light weights of up to 40 pounds. Requires good hand-eye coordination, arm, hand and finger dexterity, including ability to grasp, and visual acuity to use a keyboard, operate office equipment and read. The team member frequently is required to sit, reach with hands and arms, talk and hear. Position requires frequent typing. Position requires periodic business travel, including operation of a motor vehicle.

**Notice:** The information on this description has been designed to indicate the general nature and level of work performed by team members within this classification. This job description is not designed to contain or be interpreted as a comprehensive inventory of all tasks, responsibilities and qualifications required of team members assigned to this job. Position functions, responsibilities and activities may change at any time with or without notice.