COVENANT TRUST
141 W. Jackson Blvd., Suite 1850A
Chicago, IL 60604
800-483-2177
covenanttrust.com

Financial Services Representative

Covenant Living of Golden Valley (Golden Valley, Minnesota)

Join a company that is making a difference, and where contributions are recognized and valued.

At **Covenant Trust Company**, we serve families and institutions with a full suite of trust services, including investment management, financial guidance, and gift and estate planning. We thrive on helping our clients to achieve their purposes and make a difference in the world around them. We are a non-depository trust company chartered in 1988 and regulated by the Illinois Department of Financial and Professional Regulation, Division of Banking.

Position Details

Reports to the Vice President of Business Development and Sales Manager
Full-time, exempt, benefit eligible
Location of primary focus is **Covenant Living of Golden Valley (Golden Valley, Minnesota)** and the Northwest Conference of the Evangelical Covenant Church

Position Summary

Financial Services Representatives are the primary drivers of new business growth for the company and play a key role in client retention. The FSR's new business development activities will include developing new relationships and deepening existing relationships with residents of Covenant Living Communities, Evangelical Covenant Church entities and ministries, philanthropic organizations and boards, and prospective clients within your personal and professional networks. Through a consultative process of understanding a client's financial needs, the FSR demonstrates the value of becoming a Covenant Trust client. The FSR also serves as the primary contact person for their book of clients.

What we look for:

- Five (5) years' experience in the financial services or related industry.
- CFP® designation preferred, or other demonstrated financial expertise or competencies.
- Previous experience using a CRM is required.
- A passion for capital markets and wealth management issues.
- Established history of business development success desired.
- A heart for serving others and a passion for helping individuals and mission-centered institutions achieve their financial and charitable purposes.
- Excellent communication (oral and written) and strong client/customer service skills.
- Self-directed and highly motivated to help others and see them achieve their goals.
- Ability to meet activity metrics and business goals.
- Ability to maintain complete confidentiality and build relationships based on trust.
- Bi-lingual (Spanish) skills are a plus.
- Understanding of the Evangelical Covenant Church and its mission is desired.

- Ability and willingness to schedule presentations or meet with clients/prospects on evenings or weekends.
- Commitment to on-going education and training on wealth management issues.
- Valid driver's license.

Excellent benefits including choice of three medical plans; prescription drug coverage; dental; vision; employer paid life and disability; structured bonus; 401(k) with employer match; 11 paid holidays; PTO; paid volunteer time off; voluntary benefits include accident and critical illness, auto and home insurance, pet insurance, identity theft protection; pre-tax commuter benefits.

To apply for this position, please send a cover letter and your resume to Kiersten Lundgren, HR Manager, at kelundgren@covenanttrust.com. Position description available upon request. A resume can also be submitted through our website: Contact - Covenant Trust

Covenant Trust Company is committed to protecting client and company information. All employees are expected to adhere to company policies and practices regarding the safeguarding of such information. For more information, visit www.CovenantTrust.com

Equal Opportunity Employer