



Founded in Abbeville, LA in 1971, **Gulf Coast Bank** is known throughout Acadiana for getting to know our customers personally, and understanding their needs, as well as the needs of the community. **Gulf Coast Bank** has 9 locations across the Acadiana area and employs more than 120 people. As banking has changed through the years, Gulf Coast Bank has stayed on the cutting edge, while never losing sight of what makes our bank special: providing outstanding customer service and maintaining active involvement in the communities we serve.

## Position Summary

**Gulf Coast Bank** is looking for an Investment Administrative Assistant for our Johnston Street location. The ideal candidate will be experienced with providing customer and administrative support for processing of account transfers/transactions as well as scheduling and calendar management while assisting the Investment department of the Bank.

## Primary Responsibilities:

- Develop a general knowledge of the financial institution's personal investment products to assist Advisors in providing the highest level of customer service
- Provide client appointment preparation and documentation to ensure client interactions are handled promptly, efficiently and effectively
- Assist in servicing clients by handling the following:
  - Meeting preparation
  - Portfolio reviews
  - Information data gathering
  - Processing of client requests/transactions
  - Account maintenance
  - Provide daily, monthly reports as requested
  - Establish meaningful connections and trust with customer base
- Assist in client relationship management, including ongoing and regular client contact and communications
- Prospecting within the financial institution by establishing relationships with Bank associates and customer contacts
- Assist bank customers as appropriate to assure their needs are met in an efficient and courteous manner

## What We Offer:

- Competitive Compensation Structure
- Full Medical, Dental, Vision
- Paid Vacation/Sick Leave/Holidays



### Requirements:

- High School Diploma / Bachelor's degree preferred
- 1-3 years securities, finance and investments experience a plus
- Insurance license and/or Securities license a plus
- Highly organized and self-starter
- Excellent communication skills, both written and verbal
- Banking experience a plus
- Computer proficiency in Outlook, Word and Excel required

We are an equal opportunity employer and value diversity at our company. We do not discriminate on the basis of race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status.