Simmons Bank – Institutional Wealth Strategist

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Title: Institutional Wealth Strategist

Job ID: R114017

Job Location: Dallas, TX – 5950 Berkshire Lane

Employment Type: Full-time

Industry: Banking

Overview:

Simmons Bank is a wholly owned subsidiary of Simmons First National Corporation (NASDAQ: SFNC), a Mid-South based financial holding company that has paid cash dividends for 116 consecutive years. Simmons Bank operates 220 branches in Arkansas, Kansas, Missouri, Oklahoma, Tennessee and Texas. Founded in 1903, Simmons Bank offers comprehensive financial solutions delivered with a client-centric approach. Recently, Simmons Bank was recognized by Newsweek as one of America's Greatest Workplaces 2025 in Arkansas. In 2024, Simmons Bank was recognized by Newsweek as one of America's Best Regional Banks 2025, by U.S. News & World Report as one of the 2024-2025 Best Companies to Work For in the South and by Forbes as one of America's Best-In-State Banks 2024 in Tennessee and America's Best-In-State Employers 2024 in Missouri. Additional information about Simmons Bank can be found on our website at simmonsbank.com, by following @Simmons_Bank on X (formerly Twitter) or by visiting our newsroom.

At Simmons, "Banking on Our People" is more than just a slogan. It's the value we place on our talented, dedicated professionals. Simmons invests in our associates' success by empowering them to realize dreams – their own, our customers' and our communities'. To create an environment that promotes excellence, Simmons offers a host of career development and wellness programs, along with performance-based recognition and awards. Our excellent team has been the secret to our success throughout our 100-plus-year history, which is why Simmons is committed to nurturing a culture that earns loyalty and catalyzes potential. We're always looking for dynamic individuals who reflect our core values to join our growing team. We hope you'll consider one of our many opportunities to advance your career.

Benefits:

We're committed to the health and happiness of our associates, and offer a full-range of benefits such as:

- Major Medical, Dental and Vision
- Health Savings Account (including a company contribution)
- Paid Time Off combines your vacation, personal and sick days together giving you more flexibility on your time away
- Up to 10 Paid Company Holidays
- 401K with substantial employer match
- Discounted Stock Purchase Plan
- Profit Sharing contribution with eligibility
- Free Physical, Financial and Legal Counseling Services
- Free and Supplemental Life Insurance
- Free and Supplemental AD&D Insurance
- Paid Maternity and Paternity Leave
- Free Well-being Program with perks like financial literacy courses, pet insurance, fitness competitions, adoption assistance, military benefits, tuition reimbursement and meditation/mindfulness resources.

Responsibilities:

The Institutional Wealth Trust Strategist ensures that the accounts will be administered appropriately. Also, works closely with clients, their professional advisors, and their account's portfolio manager.

Essential Duties and Responsibilities

- Administers assigned accounts according to the terms of the controlling document, applicable laws, regulations, and policies.
- Works with the Portfolio Management Group to ensure that all accounts are invested with appropriate asset allocation, if applicable.
- Work as part of the team to support sales efforts and obtain new clients.
- Maintains appropriate contact with clients and their advisors.
- Works with other bankers and professionals, in the legal and accounting fields, to develop new trust and investment management clients.
- Ensures that the appropriate accountings are provided to parties associated with the Trust Administrator's clients.
- Responsible for all management duties of assigned associates to include hiring, performance management, salary recommendations, training of new associates and skill development of all staff.
- Participates in community and civic activities.
- Assists in budget preparation.
- Ensures that all departmental documents and activities are performed in compliance with applicable laws, regulations, policies and procedures as applicable to this position, including completion of required compliance training.
- Performs other duties and responsibilities as assigned.

<u>Qualifications</u>:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Skills

- Ability to read and comprehend simple instructions, short correspondence, and memos.
- Ability to read and interpret documents such as procedure manuals, general business correspondence and/or journals, or government regulations.
- Ability to read, analyze and interpret financial reports and/or legal documents.
- Ability to write simple-to-business correspondence, routine reports, and procedures.
- Ability to respond, in writing, to customer complaints, regulatory agencies, or members of the business community.
- Ability to effectively speak and present information in one-on-one and small group situations, to customers, clients, and other employees in the organization.
- Ability to speak effectively, present information, and respond to questions from groups of clients, customers, employees, managers, top management, boards of directors, and the general public

Education and/or Experience

- BS/BA Degree (4 year) from an accredited university/college or
- Four to six years of experience in wealth management.
- CPA, CFP, Law Degree or ABA designation in the area managed is preferred

Specialized Training

- Courses related to investments, financial planning, estate administration, or another trust-related field is helpful.

Computer Skills

- MS Word, Excel, and Outlook

Certificates, Licenses, Registrations

- An ABA trust certification is preferable.

Other Qualifications (including physical requirements)

- Must have good organizational skills.
- Must have good oral and written communication skills.
- Must have good problem-solving skills with the ability to develop creative solutions.
- Must have good interpersonal skills.