



Financial Wellness Officer

Lee Bank is investing in a Financial Wellness Officer as key initiative supporting our overarching strategy to empower employees, customers and our community. This is a full-time position for a highly skilled and experienced professional committed to a career path focused on this discipline.

This unique role will further bolster Lee Bank's strategic financial planning and financial wellness insight as a deliverable for the entire universe of Lee Bank stakeholders (employees, customers and community members). This position entails building relationships with external and internal referral sources as well as developing and following up on internal and external asset management prospects. However, this is not a sales or business development only position.

The role entails working closely with the financial planning, investment management and trust team with our strategic partner, October Mountain Financial Advisors as well as the Lee Bank business and retail banking teams.

The optimal candidate will have the following credentials, qualifications, education and work experience:

- Minimum of 10 years as a dedicated financial planning practitioner
- CFP®
- BA or BS in Mathematics, Economics, Finance and/or Accounting
- MBA with a focus on Asset Management or Masters in Financial Planning
- Deep experience working with a full range of asset management clients
- Highly proficient and well-versed with one of the following financial planning platforms:
 - MoneyGuide Pro
 - eMoney Advisor
 - Advicent
- Experience with business succession planning
- Comfortable with public speaking engagements, presentations and workshops as well as providing online content centered on financial planning topics

Please respond by sending resume to:

Email: Susan Brown, SVP at sbrown@leebank.com

or

By Mail: Attention: HR Department - Lee Bank 75 Park St. Lee, MA 01238

Lee Bank is an Equal Opportunity Employer and strong advocate of workforce diversity.
Race/Color/Gender Identity/Religion/National Origin/Disability/Veteran

#Leebank

#Empoweredbanking

#servicesinceritysimplicity