



Investment Assistant
Odyssey Wealth Services
Rochelle, Illinois Branch

Full Time
Monday through Friday
Non-Exempt Hourly

FUNCTION OF POSITION

Seeking an experienced and reliable **Investment Assistant in our Odyssey Wealth Services** office, an independent broker-dealer, located within Central Bank Illinois Rochelle Main Bank. This position is responsible for assisting Financial Advisors and Consultants in facilitating client relationships. The Investment Assistant is responsible for account set-up and administration of same, responsive to client inquiries and requested services, and managing compliance and operations of the Odyssey Wealth website. The position also coordinates and attends client events.

ESSENTIAL KNOWLEDGE & SKILLS

- Qualified candidates must have proven work experience in a brokerage or investment office with good working knowledge of brokerage regulations.
- This position demands a high degree of client confidentiality and professionalism.
- Knowledge of Microsoft Office programs required.
- Knowledge of CRM systems beneficial.
- Excellent communication skills using proper grammar.
- Have a strong attention to detail
- The maturity necessary to request additional explanation, instruction or direction necessary for successful task completion
- Willing to adapt to change in procedures and tasks
- Should be a self-starter, ability to handle multiple job duties simultaneously and emotionally mature in handling stress
- Must be reliable and dependable with punctuality and attendance
- Series 6 License and Life Insurance License preferred, but not required.

EXPERIENCE & KNOWLEDGE

The successful candidate must have a minimum of a high school education/graduation and preferably at least one (1) through two (2) years of experience in banking or related experience in another company.

BENEFITS*

- Health, Dental & Vision Insurance
- Health Reimbursement Arrangement
- Life Insurance & AD&D Insurance
- Long Term Disability Insurance
- Vacation & Paid Time Off (PTO)
- 401k Profit-Sharing & Match
- Flexible Spending Account
- Tuition Reimbursement Program
- Incentive Plan
- Holiday Pay
- Logo-wear Stipend

COMPENSATION

The pay range for this position is \$16.50 to \$20.00. Please note that the pay range provided is a good faith estimate for the position at the time of posting. Actual compensation will be dependent upon factors, including but not limited to the individual's qualifications, experience, knowledge, skills, and abilities.

Interested applicants should send resume and cover letter to:

Central Bank Illinois
c/o Odyssey Wealth Services
Attn: Ashley Jackson
340 May Mart Drive
Rochelle, IL 61067

Or email to; recruiter@central-bank.com.

Equal Opportunity Employer
Posted 11/07/2025

**Some benefits have an eligibility-waiting period*