



Career Cluster/Industry Sector Focus Meeting: Finance – May 13, 2026

Employers who plan and provide services for financial and investment planning, banking, insurance, and business financial management.

EMPLOYER	Financial Freedom	First State Bank	LCNB National Bank	Peoples Bank	Smith-Feike-Minton Insurance	Wilmington Savings Bank
BUSINESS DESCRIPTION	basic financial education and planning, investment management	personal and business banking and loan services	personal and commercial banking, loans, investment services, and portfolio management	personal and commercial banking and loans, personal and life insurance, trust and wealth management services	personal, commercial, life and health, and farm insurance agent	personal and business banking and loans
CAREER PATHS	Independent agents	Customer service, marketing, IT	Customer service, fraud investigation, marketing, wealth management, investments		Receptions, processor, account manager, sales agent	Customer Service Representatives, Loan Servicing, Marketing
IN-DEMAND POSITIONS	Financial strategist, licensing coordinator, insurance coordinator		Teller, banker	Teller, banker	sales agent	

TRAINING INFORMATION	State licensing process, finance background not necessary, mentorship and training provided by the parent agency (Miliare Group) while working	Employees start at customer service level and work their way up, training through Ohio Bankers League, internal management training program through all departments	Must have high school diploma but will help pay for more schooling for certain positions; internal training program to learn about all departments and areas; can create a training and career path for whatever area an individual is interested in	Professional Development Associates Program (1 year rotation directly out of college), will hire with all levels of education; customer service is desired starting skill	Will hire with all levels of education and will train upon hiring, state licensing process, will pay for licensing and continuing education while working	Management training program for students starting at Customer Service Representatives; will hire students with Accounting, Finance, Marketing, and Business Development degrees
K-12 and COLLEGE OPPORTUNITIES	Participate in the Clinton-Massie alumni fair	Banking 101 as a 1-day or 12-week program for local schools	K-12 in-classroom work on financial literacy	High school financial literacy classes like Banking 101 and Credit Would like to do more at elementary school level Have hosted field trips	K-12 in-classroom visits, mock interview experience, open to job shadows High school student internships during the school year or over the summer with emphasis on soft skills that are useful no matter what their career path College internships can lead to a hire	
OTHER	Excellent opportunity for someone interested in owning their own business, low cost way for college students to build a business while still in school	Goal is to always hire local with a focus on community connection Can offer Banking 101 for employers and employees		Also offer education for employers and employees on fraud, buying a home, building your credit	As a small business, you end up doing a little bit of everything: HR, building management, etc.	

COMMON THEMES

- Financial literacy classes often include conversations about careers in banking and finance as part of the understanding of what goes on behind the scenes.

COMMON CONCERNS

- Financial literacy and access to programs to teach that is a concern across all age groups, students as well as those in the workforce. That education also needs to include conversations about fraud.

INFORMATION for EDUCATORS

- Job shadowing for banks can be a challenge because of security and confidentiality.
- Job shadowing with insurance agents in the field is not an option because the agents travel to the customer but could be arranged for work in the office.
- Interns have to go through the same clearance as employees – background check, fingerprints, drug screening, and credit check.
- As employees, high school graduates are lacking:
 - Microsoft Office computer skills, specifically Excel, Word, PowerPoint, and Outlook
 - Personal presentation skills (confidence, eye contact, etc.)

INFORMATION for EMPLOYERS

- For those looking to get into a school, start with the principals who will initiate and follow through with individual teachers and counselors.
- Wilmington College has a lot of students interested in the banking industry. Business and Finance majors spend time distilling what their professional focus will be.

Disclaimer: The information provided here was gathered from employers, educators, and service providers in attendance at the Clinton County Workforce Collaborative meeting on May 13, 2026. This information is provided as a reference only and should be confirmed with the relevant employer prior to any action.