



## **Trust Administrator Assistant**

### **Duties & Responsibilities**

This position is responsible for providing administrative support to the Trust Administration Department. The position requires superior attention to detail and organizational skills. The responsibilities include tasks required to complete trust administration in an efficient and timely manner. In addition, the person in this position must be tech-savvy, dependable and able to work both independently and as part of a team. Regular attendance and timelines are essential functions of this position.

- Request, receive, evaluate, and organize required documentation in connection with trusts for which the Company is being considered to serve as Trustee
- Initial entry of information for trusts, for which the Company serves as Trustee into the Company's accounting software, and file setup for Trusts
- Administer opening bank and brokerage accounts for Trusts
- Process directions for investment transactions to be carried out for Trusts
- Process requests or directions for distributions from Trusts
- Process payments of expenses of Trusts
- Draft/send Crummey notices and other beneficiary notices when required
- Request, receive, evaluate, and organize information and documentation in connection with the administration of Trusts
- Record transactions in the accounting software for Trusts
- Perform annual reviews of Trusts
- Assist with the collection of amounts owed for the Company's services as Trustee
- Demonstrate Patriot Act compliance
- Perform other duties as necessary and as assigned by management

### **Knowledge & Skill Requirements**

- High School graduate/GED required, Associates Degree, Certificate or Bachelor's degree preferred
- Experience working in Trust, Banking or other Financial Services Industry, or Law Office preferred
- An interest and/or experience in Trust Administration
- Ability to take initiative when appropriate
- Proactive thinker with ability to anticipate potential issues
- Excellent organizational and time management skills
- Excellent communication skills (verbal and written)
- Ability to prioritize, coordinate and handle multiple projects to meet deadlines
- Ability to organize documents, files and folders in a timely manner
- Strong computer skills, including high proficiency in Microsoft Office applications, and the ability to learn and master new programs quickly