

Trust Operations Team Lead

Title: Trust Operations Team Lead
Team: ClearPoint Federal Bank & Trust
Reports to: Trust Operations Manager, Merri Stephens
FLSA Status: Exempt

SUMMARY: This is a full time position providing support to customers and the families they serve. This person will provide oversight and direction to the Trust Operations Team in performance of daily operations activities for both the trust accounting and recordkeeping areas.

RESPONSIBILITIES:

- Manage team workflow on a daily basis to maximize effective utilization of resources and help team meet its quality and responsiveness measures
- Monitor customer service phone queue (ACD) and assign/adjust resources as necessary to maintain adequate coverage during established business hours
- Validate requests and process any transactions requiring backdating
- Develop and maintain SOPs for team as new processes are implemented
- Provide back-up support for unique customer processing
- Administer all aspects of fee processing related to customer accounts
- Troubleshoot processing issues as they arise and drive to prompt resolution
- Perform daily approval functions in TrustDesk and USBank for cash inflows, transfers, and outflows
- Oversee task list assignments and drive timely completion of work
- Contribute to the team's performance by addressing barriers and generating alternative solutions to meet or exceed team goals
- Drive efforts and assist team with creating and maintaining current standard operating procedures for trust processes
- Conduct call and processing reviews to assess team and individual performance against established measures, and compile monthly metrics reports summarizing results
- Work with operations manager to identify, prioritize and implement projects related to team functions
- Provide guidance to team members, participates in meetings, and makes decisions in the Manager's absence when appropriate based on knowledge and experience
- Investigate and rectify customer issues in a timely manner, included taking elevated customer issues
- Consistently maintain a positive attitude and demonstrate positive behavior, promoting same throughout the team

REQUIREMENTS:

- Bachelor's degree or equivalent work experience in financial services or banking industry
- Minimum of 3 years experience in a team lead or other supervisory role
- Strong attention to detail and accuracy
- Self-directed and results oriented with effective problem solving skills
- Excellent written and oral communications skills
- Self-starter willing to work multi-task projects and processes
- Demonstrated knowledge and ability to use Microsoft Access, Excel, and Word
- Experience in trust or funeral services industry a plus