Assistant Trust Administrator

Job Brief

At ClearPoint, you are given the opportunity to do meaningful work aligned with your strengths, in an environment where you have a voice, are encouraged to collaborate with others, and ultimately create your own career path. Responsible for supporting the Trust Administration team in daily administration and servicing of clients. Responsible for responding directly to customers on their needs by providing support for the Customer Service inbox and phone queue. Support Marketing team with projects and tasks. This person must be detail oriented, highly organized and must possess flexible skills to deal with the various nuances of trust accounts, including the ability to anticipate issues. Based in our Batesville, Indiana office, you will work closely with members of the ClearPoint team.

RESPONSIBILITIES:

- This position is responsible for the daily administration of trusts. Examples of daily administration would include tracking dates and deadlines, timely deposit, withdrawal and transfer of funds, periodic customer reporting and presentation, tax worksheet preparation, support schedules for audits, document filing system and assistance with the annual account reviews.
- Provide daily support for key customers as requests are made and serve as back-up on accounts when primary administrator is unavailable.
- Provide support for the Customer Service inbox and phone queue.
- Provide research and analytical support for the Trust Administrator(s).
- Provide support in the onboarding of new clients, and the opening and closing of accounts. This includes managing in a timely manner the efficient transfer of assets and records either to or from ClearPoint as successor trustee.
- Communicate and maintain a good rapport with peers outside the company in order to help common clients, obtain new business, and be on the forefront of legislative changes.
- Understand client's needs and objectives to better serve them.
- Willingness to grow and take on additional responsibilities as warranted, and learn all aspects of trust administration.

REQUIREMENTS:

- Associates degree or Four-year college degree in business administration or related field or equivalent work experience.
- One to three years' experience in a trust department or related experience is a plus but not required.
- Demonstrated problem solving, decision making and communication skills, both written and oral.
- Ability to work independently.
- Continuous improvement mindset. Must take initiative to address issues proactively.
- Proficient with technology including trust accounting systems, email, Excel, and Word.
- Ability to coordinate and complete multiple tasks in a timely and efficient manner.
- Knowledge of preneed funeral and cemetery trusts is a plus, but not a requirement.