Assistant Trust Administrator

Job Brief

At ClearPoint, you are given the opportunity to do meaningful work aligned to your strengths, in an environment where you have a voice and can collaborate with others, and ultimately have the chance to 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 calls. This person must be detail oriented, highly organized and must possess flexible skills to deal with the various nuances of trust accounts, technology, and the ability to anticipate issues.

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, audit support, 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 research and analytical support for the Trust Administrator(s).
- Communicate with individuals at all levels, including clients and their investment advisors, auditors, tax preparers and consultants.
- Provide primary support for the Call Center answering customer and consumer calls.
- Responsible for checking the Customer Service inbox to direct the documents into the workflow process and return calls.
- Understand client's needs and objectives in order to better serve them and offer additional products and/or cross-selling opportunities.
- Support the Trust Administration Team in meeting team goals and project deadlines.
- Conduct client portal training with new users.
- Willingness to grow and take on additional responsibilities as warranted and learn all aspects of trust administration and customer service.

REQUIREMENTS:

- One to three years of related work experience.
- One to three years of experience in a customer service, bank or trust department is a plus, but not required.
- Demonstrated problem solving, decision making and communication skills, both written and oral.
- Ability to work independently and meet deadlines.
- Continuous improvement mindset. Must take initiative to address issues proactively.
- Proficient with technology including trust accounting systems, Outlook, 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.