



Texas Audit Coordinator

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. This position actively supports the Sr. Operations Supervisor and Operations team by providing responsive and compliant processing for our Texas-based clients. In addition, this role will serve as the primary processor for the bank's largest national account. This role is responsible for working directly with valued clients in performing accurate and responsive processing for new business, payment and claims in addition to facilitating audit support and providing state specific expertise to internal and external customers. This position is based in our Woodlands, Texas office.

RESPONSIBILITIES:

- Develop a detailed understanding of the business processes and dependencies associated with our role in maintaining accurate client records
- Understand audit aspects and processes associated with and enforced by the Texas Department of Banking
- Foster a collaborative relationship with auditors from the Texas Department of Banking
- Review and assemble customer records monthly for the purpose of routinely reconciling account transactions for relevance and accuracy
- Assist in research of the overlay reconciliation report; escalate issues appropriately
- Perform audit and reconciliation responsibilities for assigned clients, presenting results to regulators according to the defined schedule
- Direct audits through all stages from planning, documentation, and inquiry resolution to ensure timely completion of all components, including the final report out
- Works collaboratively with the clients, trust administrators, internal management and outside auditors
- There are no direct supervisory responsibilities with this role, however the incumbent is expected to carry the ClearPoint culture and demonstrate excellent leadership qualities in working with clients, vendors, and internal staff
- Ensure compliance with regulations and company policies
- May provide assistance in reviewing and assessing quality for Operations processes

REQUIREMENTS:

- Bachelor's degree in business, Audit or related field preferred; equivalent combination of education and experience will be considered
- Demonstrated use of Microsoft Office products: Excel, Word, PowerPoint
- Experience with reporting and query tools, such as SQL a plus
- Ability to read, analyze and interpret information from a variety of business process systems
- Detail oriented, work with minimal supervision, is self-directed and possesses a results-oriented mindset
- Excellence in professional communication skills, both written and verbal
- Ability to handle multiple priorities and demonstrate teamwork in a customer service environment
- Organization and the ability to work multi-task projects and processes
- Complete assignments with thoroughness and strong attention to detail
- Travel demands include scheduled trips to the Home office in Batesville, IN; no more than quarterly