

# Trust Operations Team Lead

## Job Brief

We are looking for a professional who has supervisory experience and a track record of providing exceptional customer service to both internal and external customers. This position is responsible for providing 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
- Validate special processing requests and process transactions, as needed
- Develop and maintain SOPs for team as new processes are implemented or process changes are made
- Provide back-up support for unique customer processing
- 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
- Monitor systems and DDA reconciliation daily to identify required actions and ensure resolution within 24 hours
- Oversee task list assignments and drive timely completion of work
- Contribute to the team's performance by generating alternative solutions to meet or exceed team goals
- Conduct 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, participate in meetings, and make decisions in the Manager's absence when appropriate
- Investigate and resolve elevated customer inquiries in a timely manner
- 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 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