



At ClearPoint, you are given the opportunity to do meaningful work aligned to your strengths, in an environment where you have a voice, can collaborate with others, and ultimately have the choice to create your own career path.

Job Location: Batesville, IN Office or Houston, TX Office

**Operations Specialist, Special Servicing
Job Brief**

This position will serve as a cross-functional team member within the Special Servicing Team providing recordkeeping-only, account on-boarding and other special processing for key accounts, investment related processing, and support for audits and other regulatory processes. The key focus of this role will be to complete high profile transaction processing accurately and in a timely manner to meet or exceed key customer expectations. Additionally, this position will provide analytical support to the trust and recordkeeping areas on both a daily and special project basis.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Complete full scope of recordkeeping-only processing for customers utilizing outside trustees and processing for customers under the recordkeeping-only/trust-only combo model
- Administer regular processing and shadow posting of transactions for assigned key accounts
- Complete investment trade and related processing for trust and recordkeeping areas, including management of the OS Processing mailbox
- Assist in data analysis and onboarding activities for new trust accounts
- Provide daily phone support on trust to our customers, similar to an automated phone queue (ACD line)
- Participate in data gathering and other efforts for required regulatory audits
- Provide analytical support to the team as necessary for research and resolution of daily issues and on a project basis as needed
- Work independently to complete assigned tasks on a timely basis with minimal errors
- Consistently maintain a positive attitude and demonstrate positive behavior
- Must identify and implement process improvements for position

MINIMUM REQUIREMENTS

- Minimum of two-year college degree in business or related field, or similar work experience. Trust operations or other financial operations processing experience preferred
- Coursework in finance and accounting required. Knowledge and demonstrated use of Microsoft Office products: Excel, Word, and PowerPoint, with a particular emphasis on Excel
- Continuous improvement, deadline driven, and detail-oriented mindset
- Demonstrated problem solving, decision making, and communication skills, both written and spoken
- Ability to take on additional responsibilities as needed
- Willingness to work additional time as required for projects and job tasks
- Ability to work independently with minimal supervision