



Chief Fiduciary Officer

Job Brief

At ClearPoint Federal Bank & Trust (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 have the choice to create your own career path. This position requires professional expertise and the technical knowledge of trust and bank regulations and rules, as well as the internal policies and procedures of a bank and trust department. The Chief Fiduciary Officer (CFiO) is an executive tasked with connecting the sales, marketing, and customer relationship management teams and processes within the bank to create the ideal customer experience. The CFiO must provide a comprehensive and authoritative view of both the customer and the products, working to create corporate and customer strategy at the highest levels of the company. The CFiO is responsible for maximizing customer acquisition, retention, and profitability within the applicable regulatory framework. This person must have strong interpersonal skills and the capability to proactively manage relationships both with customers and internal team members.

ESSENTIAL DUTIES AND RESPONSIBILITIES Other duties may be assigned.

- Oversee all members of Trust Administration, Sales, Marketing, and Legal, helping members of the team to work effectively with the customers and other employees of the bank.
- Proactively communicate with customers based upon their size and activity, ensuring the needs of top customers are met, and pulling in additional resources and staff as necessary. Communication can be via telephone, electronic means, or personal visits.
- Have ultimate responsibility for supervision of all outward facing staff and be comfortable working in a collaborative environment. Includes facilitating development of improved policies and procedures through use of appropriate resources.
- Responsible for the bank sales team, monitoring progress through metrics that are developed and evaluated annually. Implement approach and have ultimate responsibility for ensuring an effective process and experience for potential customers.
- Ensure that the customer experience always meets the highest standards and expectations, working with Senior Management Team to communicate and implement any changes and improvements, as needed.

- Serve on the Fiduciary Oversight Committee from a legal and fiduciary perspective, ensuring that evaluation of trust agreements and customer sign up documents is thorough and meets expectations of the bank and any appropriate regulators.
- Serve in various compliance related roles to ensure the bank maintains an appropriate compliance environment to meet regulatory requirements.
- Oversee Marketing department to ensure that the bank's marketing timeline and approach is consistent with customer needs and developments to push forward sales efforts and goals.
- Willingness to grow and take on additional responsibilities as warranted.
- Ability to communicate with individuals at all authoritative levels, including customers and their investment advisors, auditors, tax preparers and consultants.
- Ability to communicate and maintain a good rapport with peers outside the company to help common clients, obtain new business, and be on the forefront of legislative changes.
- Ability to understand customer's needs and objectives in order to better serve them, to and offer additional products and/or cross-selling opportunities.

REQUIREMENTS

- ❑ Four-year college degree in business management or related field.
- ❑ At least ten years' experience in a trust department or related experience.
- ❑ Law degree, CTFA or similar trust/fiduciary-related certification.
- ❑ Experience interfacing with the OCC or other banking regulators.
- ❑ Demonstrated problem solving, decision making and communication skills, both written and spoken.
- ❑ Continuous improvement mindset. Must take initiative to address issues proactively.
- ❑ Proficient with technology including trust accounting systems, email, excel, 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.