

**Position:** Wealth Management Administrator

**FLSA:** Non-Exempt

**Reports To:** Trust Division President

## Summary

Under supervision by management, and in accordance with established policies and procedures, responsible to provide effective and efficient support of wealth management associates, advisors, and officers. Provide daily internal administrative support in alignment with established bank policies and procedures and within regulatory guidelines.

## Essential Functions and Responsibilities

**Note: Performance in this position will be evaluated based on the incumbent's ability to complete the following duties efficiently.**

1. Enters deposit and disbursement transactions in trust accounting system.
2. Handles account opening and closings within trust accounting system, investment management, and ancillary compliance paperwork.
3. Completes annual trust account administrative reviews.
4. Completes wire transfer forms.
5. Assembles client reports for meetings and quarterly mailings.
6. Enters trades into investment management software.
7. Scans, organizes, and saves documents.
8. Prepares materials for client review meetings and trust oversight committee meetings.
9. Performs other duties, responsibilities and activities, which may change or be assigned at any time with or without notice.

## Skills and Abilities

1. Ability to work independently and accurately and maintain good customer relations with the ability to adapt to varying customer and transactional volume. Must be able to quickly re-establish priorities, responding to the changing needs of the department.
2. Aptitude and ability to easily learn new technology and software including proficiency in Microsoft Outlook, Excel, Word and Adobe Pro.
3. Willingness to learn new processes and procedures with ability to identify and recommend efficiencies.
4. Demonstrated attention to detail, accuracy and completeness of work.
5. Works effectively with teams to accomplish department and organizational goals, with the ability to develop and maintain strong relationships with internal staff, as well as external partners.
6. Ability to maintain the highest level of confidentiality of customer, bank and prospective client information

### **Working Conditions**

1. Normal office environment with minimal noise, temperature variation or dust.
2. Manual dexterity skills for typing and use of computer and other related office systems and equipment.
3. Occasional bending, reaching and stooping.
4. Constant visual effort is required. 75-100% of the workday is spent at a computer monitor and/or with written or computer-generated paper documents.
5. Constant sitting is required.

### **Training and Preparation**

1. High school diploma or equivalent required. Associate or Bachelor-level degree in business or related field, or equivalent combination of education and experience preferred.
2. Prior experience with investment management software and/or trust accounting software a plus.
3. Previous banking or financial training or coursework helpful.

*There is no employment agreement intended or implied by this job description. Also, this job description does not modify or limit the employment-at-will relationship.*