

**Position:** Client Relationship Coordinator  
**FLSA:** Non-Exempt  
**Reports To:** President – Trust & Wealth Management

## Summary

Under general supervision and accordance with established policies and procedures, is responsible to provide effective and efficient support of wealth management associates, advisors, and officers, as well as to the Division President. Provides daily internal administrative support to the Division and serves as back-up to the Wealth Management Administrators to provide operational and administrative support for external clients, in addition to being responsible for assigned client tasks.

## 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. Handles account opening and closings independently within trust accounting system and investment management and completes ancillary compliance paperwork.
2. Complete annual trust account administrative reviews on a regular basis.
3. Prepares investment, performance and other materials for client review meetings and trust oversight committee meetings. May attend client meetings, as requested.
4. Prepare and send reports, including client performance reports, from trust accounting software, portfolio management software, and performance reporting software as requested by Administrators and Division President.
5. Perform basic accounting duties, including maintaining records for manual checks issued by the department, bill payments, money transfers, wire transfers, deposits, maintain check book register and account balancing.
6. Enter deposit and disbursement transactions in trust accounting system.
7. Perform daily review of obituaries and cross-check against customer list.
8. Perform administrative duties for the Trust Division including greeting and welcoming clients, answering phone calls, scheduling meetings, preparing correspondence and mailings, processing mail and other administrative tasks as needed.
9. Perform other duties, responsibilities, and activities, which may change or be assigned at any time with or without notice.

## Skills and Abilities

1. Must be able to work independently, 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. Effectively utilizes and leverages department software programs for portfolio management, financial planning, and trust accounting to support the department.

3. Willingness to learn and utilize new software and technologies to create efficiencies within the role and the department.
4. Demonstrated attention to detail, accuracy, and completeness of work.
5. Works effectively with the team to accomplish department and organizational goals, with the ability to develop and maintain strong relationships with internal staff, as well as external partners including vendors, suppliers, and other support functions, as well as potential and current clients.
6. Ability to maintain the highest level of confidentiality of customer, bank and prospective client information.
7. Exhibits and models high level of professionalism, tact, sensitivity, and business etiquette to internal and external contacts and clients.

### **Working Conditions**

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

### **Training and Preparation**

1. Requires an Associate or Bachelor-level degree in business or related field; or equivalent combination of education and experience is required
2. Prior experience with investment management software and/or trust accounting software is helpful.
3. Previous experience in banking or financial investment fields is preferred.

*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.*