



CREATIVE PLANNING

Title: Trust Administration Associate

Location: Overland Park, KS

Job

Description:

JOB SUMMARY

Creative Planning is a top tier wealth management firm that provides investment management services and full comprehensive financial planning in-house. Creative addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education, and charitable planning – using all in-house specialists.

The Trust Administration Associate provides administrative and operational support to assigned Trust Officer(s).

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Assist Trust Officers in the administration of accounts
- Classify and file client documents in document management software
- Enter disbursement and receipt transactions on various accounting platforms
- Set-up and monitor recurring payments to/from client accounts
- Review transaction reports as it relates to daily account administration; Discuss appropriate resolutions with Trust Officer
- Monitor available cash for upcoming disbursements
- Perform maintenance functions on trust accounting platform such as ticklers, and receipt and disbursement transactions
- Answer incoming calls appropriately, notate accurate messages from and be able to assist clients in Trust Officer's absence
- Prepare correspondence to clients, beneficiaries, etc.
- Produce reports and Excel spreadsheets as needed
- Accurately sort and disburse incoming mail

EXPERIENCE / QUALIFICATIONS

- Bachelor's Degree preferred and at least 5 years personal trust experience
- Ability to foster positive client relationships
- Ability to represent the organization and the trust team in a professional and positive manner
- Exceptional organizational and time management skills
- Ability to work in a team environment and independently

TECHNICAL SKILLS

- Microsoft Office proficiency
- Keen attention to detail