



Title: Trust Administration Officer

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

Creative Planning Trust Company is a Nevada licensed trust company that provides trust services primarily for clients of Creative Planning, a top tier wealth management firm that provides investment management and financial planning services to the public.

Creative Planning Trust Company is seeking a **Trust Administration Officer** to independently administer daily activities of moderately complex irrevocable trust relationships, in addition to supporting the relationship management services provided by Creative Planning.

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

Job Duties:

- Administer trust accounts in accordance with the terms of the governing documents consistent with the needs of account owners, beneficiaries, and/or remaindermen.
- Manage relationships with various interested parties, including trust grantors, beneficiaries, remainders, and wealth managers.
- Assess and resolve issues and concerns associated with trust administration, such as requests for special distributions or planning and approving necessary expenditures under HEMS standards.
- Monitor daily transactions required in the administration of trust accounts.
- Communicate with wealth managers, financial planners, tax professionals, estate planning attorneys, trust operations, and others as required in the administration of accounts.
- Facilitate account maintenance on trust accounting system, including account onboarding and termination processes.
- Actively participate in trust committee meetings for decisions regarding acceptance, special assets, discretionary requests, and other administrative matters
- Perform other duties as required.

Required Experience/Qualifications:

- Bachelor's degree in business, finance, accounting, or related field
- At least 3+ years of related experience in trust administration and/or banking services
- An equivalent combination of formal education and/or related trust industry experience will be considered.
- Highly motivated with the ability to work autonomously while keeping management apprised of potential issues.
- Ability to assess, prioritize, and process numerous daily requests in a timely and competent manner.
- Excellent organizational skills with outstanding attention to detail and strong time management
- Effectively work under intensive deadlines with frequent interruptions
- Ability to ask for and receive feedback on work and apply changes, as necessary.
- Basic understanding of trust laws and general administrative procedures
- Good presentation and written communication skills
- Professional, confident, and positive demeanor
- Ability to work under pressure and meet deadlines.
- Strong analytical and problem-solving skills