Title: Trust Officer

Location: Las Vegas, NV

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 Officer** provides trust administration services that consist of independently administering daily activities of, moderately complex, to complex high-net worth clients, and multi-generational relationships. The **Trust Officer** partners with relationship management services provided through Creative Planning to provide a superior client experience.

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.
- Partner with CP Wealth Management to assess and resolve issues and concerns associated with trust administration.
- Review distribution requests.
- Monitor available cash for upcoming disbursements.
- Coordinate and track disbursement and receipt transactions. Which includes set-up and monitoring of recurring payments to/from client accounts
- Review transaction reports as it relates to daily account administration.
- Account maintenance.
- Communicate with wealth managers, financial planners, tax professionals, estate planning attorneys, trust operations, and others as required in the administration of accounts.
- Ability to delegate appropriate responsibilities under support model and maintain accountability for timely completion.
- Schedule and attend meetings as needed.
- Other duties as assigned by the team leaders.

EXPERIENCE / QUALIFICATIONS

- Bachelor's degree in business, finance, accounting or related field preferred.
- At least 5 years personal trust experience preferred.
- 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.
- Ability to represent the organization and the trust company in a professional and positive manner.
- Exceptional organizational and time management skills.
- Ability to work both in a team environment and independently.
- 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.
- Strong analytical and problem-solving skills.
- Open to development, and desire to expand responsibilities.

TECHNICAL SKILLS

- Proficiency in Microsoft Office, especially Microsoft Excel.
- Keen attention to detail.
- Ability to manage multiple priorities.
- Ability to adapt to the needs of a growing business.
- Flexibility in adhering to company policies and procedures.