



CREATIVE PLANNING

Title: Trust Investments Officer, Real Estate

Location: Remote

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 Investments Officer** manages a group of Specialty and Hard-to-Value **Real Estate** assets within their area(s) of expertise to ensure they are managed as outlined by the policies and procedures of Creative Planning Trust Company.

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

JOB DUTIES

- Must have the requisite knowledge in how to review and handle a variety of Specialty Assets for risk, suitability, and performance in trust accounts. Portfolios of Specialty Asset classes could include Real Estate, Closely Held Businesses, Mineral/Oil/Gas Interests, Insurance Policies, and/or Promissory Notes.
- Ensure Specialty Assets are managed within the framework of the OCC Handbook relating to Unique and Hard-to-Value assets.
- Review key documents pertaining Specialty Assets ensuring all key details are identified and disseminated to the appropriate trust area including Trust New Business, Trust Administration, Trust Operations, and Trust Investments.
- Contribute to and cultivate the knowledge of the investments staff within each specific Specialty Asset class area.
- Work with the Trust Investments Manager to develop efficiencies in the management of the Specialty Assets.
- Partner with the Trust Investments Manager on key initiatives of the team.

EXPERIENCE / QUALIFICATIONS

- Bachelor's Degree preferred and at least 5 years Specialty Asset management experience within a trust company environment.
- Ability to foster positive client relationships.
- Ability to represent the organization and the trust team in a professional and positive manner.
- Passion for growing and developing team-members.
- Exceptional organizational and time management skills.
- Ability to work in a team environment and independently.

TECHNICAL SKILLS

- Microsoft Office proficiency
- Keen attention to detail