



CREATIVE PLANNING

Title: Trust Associate

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 Associate** provides administrative and operational support to assigned Trust Officer(s) within 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

- Assist Trust Officer(s) in the administration of accounts. This includes but is not limited to reviewing of trust agreements, Wills, financial statements, and asset related documentation.
- Classify and file client documents in client files.
- 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.
- Prepare discretionary memos for Trust Officer and/or committee review.
- Review transaction reports as it relates to daily account administration; Discuss appropriate resolutions with Trust Officer(s).
- Assist Trust Officer(s) with account maintenance.
- Answer incoming calls appropriately, notate accurate messages from and be able to assist clients in Trust Officer's absence.
- Communicate directly with clients and other lines of business at Creative Planning.
- Produce reports from the trust accounting system and Excel spreadsheets as needed.
- Accurately sort and disburse incoming mail.
- Prepare correspondence to clients, beneficiaries, wealth managers, etc.
- Schedule and attend meetings as needed.
- Other duties as assigned by the team leaders.

EXPERIENCE / QUALIFICATIONS

- Bachelor's Degree preferred.
- At least 2 years of banking or office experience required, personal trust experience preferred.
- Ability to foster positive client relationships.
- Ability to review trust documents and financial statements.
- 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.
- Open to development, and desire to expand responsibilities.

TECHNICAL SKILLS

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