



Title: Trust Officer

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. The **Trust Officer** provides trust administration services on behalf of Creative Planning Trust Company, a licensed Nevada trust company.

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

**Job Duties:**

- Provide information on the trust company's services to potential trust administration relationships
- Evaluate potential trust administration relationships for suitability with the trust company's services and the trust company's ability to be appointed and serve under the governing agreement
- Assist with the onboarding of new trust administration relationships
- Service existing trust administration relationships, including evaluation of distribution requests and coordination of legal and tax matters
- All other duties as assigned

**Required Experience/Qualifications:**

- Bachelor's degree
- Efficient, detail-oriented, and accurate

**Preferred Experience/Qualifications:**

- Juris Doctorate
- Certified Trust and Fiduciary Advisor (CTFA) designation
- 8+ years of trust administration experience