



Example of Trust Associate Job Description

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Our innovative and growing company is looking for a trust associate. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for trust associate

- Manage processing functions of unit trust dealings
- Monitor and control day to day operations to ensure compliance with business and regulatory requirements and meeting all service standards
- Assist team leader on resources planning, staff development and process improvement
- Opens and terminates accounts on record
- Reviews all client reports for accuracy
- Assist Marketing Manager in developing and executing marketing programs to increase penetration of wealth planning solutions with new and existing clients
- Help to build internal awareness campaigns designed to foster broader adoption of wealth planning/Advice Lab areas across the Integrated Team
- Work with Marketing Manager to create sales tools to support front office advisors (articles, product profiles, presentations)
- Advise both Trust Companies (N.A)
- Power of attorney

Qualifications for trust associate

- Programming skills (VBA) are a plus but not required
- Must be an excellent team player, and possess strong leadership skills
- Must be well organized, and able to multi-task, prioritize, and meet deadlines

- Series 7 required within 90 days following the completion of training
- Series 63 required within 90 days of obtaining Series 7 licensing