



## Example of Trust Associate Job Description

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Our growing company is searching for experienced candidates for the position of trust associate. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

### Responsibilities for trust associate

- Manage and run our extensive digital and offline marketing programme to acquire new customers for our trusts
- Research, plan and execute new campaigns through a range of channels including affiliates, natural and paid search, social media, email other channels when appropriate that can support our trusts
- Ability to monitor and analyse campaign data and provide analysis and reports with recommendations for improvement to optimise future campaigns
- Manage professional and personal investor websites and maintain data accuracy and campaign pages
- Produce and maintain marketing collateral, ranging from brochures to emails, ensuring that it is compliant, accurate, aligns to Brand and fits with the overall marketing and business objectives
- Ensure communication processes and content adhere to company/industry standards and compliance regulations via an electronic workflow management system (ECM)
- Liaise with marketing colleagues and stakeholders to ensure best execution, consistency and adherence to corporate and brand guidelines
- Directly support the Global Head of T&E tracking and reporting on initiatives and day-to-day team operations
- Act as key contact to the practice by supporting daily inquiries, gathering data on account and relationship information, and administering internal communications regarding trainings and initiatives

## Qualifications for trust associate

- Employment contingent upon licensing
- CFA charterholder/candidate, CFP, or CPA preferred
- Proficient user of Microsoft Office, Bloomberg and Factset
- A minimum of three to five years related work experience or equivalent combination of work/educational background. Demonstrated proficiency and effectiveness in strong customer service, communications, problem solving and organizational skills
- Series 7 and 66 license required (must be obtained within three months of employment)
- University graduate with at least 5 years supervisory experience preferably in banking and finance operation