



Example of Trust Operations Specialist Job Description

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Our company is looking for a trust operations specialist. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for trust operations specialist

- Responsible for accurately processing high volume and high value transactions from clients or relationship/client management teams
- Ensure that daily processing and control procedures are completed, documented and properly recorded
- Monitor daily client activity for trade settlement and funding activities
- Work proactively with Broker/Dealers and Direct Issuers to confirm trade execution/Resolve issues and discrepancies
- Daily reconciliation with DTC IPA positions
- Assist with development, implementation and training for a multiple site business resiliency plan for Corporate Trust Operations
- Responds to operational inquiries from relationship managers and trust assistants
- Responsible for closing account activities and will require external communication with brokers, vendors
- Reconcile transfers, fee collection, securities and asset transfers, and other department operations activities
- Candidate will be responsible for accurately processing multiple transaction types in a fast paced, deadline driven payroll distribution unit

Qualifications for trust operations specialist

- Able to adapt to a volatile work schedule
- No specific certifications, licensure or registrations are needed to satisfactorily perform this job
- Undergraduate degree and/or equivalent work experience required
- Must have strong team work to support colleagues during heavy workloads
- Bachelor's degree or 5+ years of Trust Operations Experience