# Example of Trust Operations Specialist Job Description



Our innovative and growing company is looking to fill the role of trust operations specialist. 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 operations specialist

- Perform research and provide resolution related to client payroll distribution files or individual payroll related transactions
- Candidate will operate independently on daily basis and will be expected to work overtime when required to meet business needs
- Protects the interests of the bank and our client by accurately posting specialized work on of our core systems in a timely basis
- Working with Trust & Safety lead and cross-functional teams to develop and enhance internal policies and tools
- Lead projects or initiatives that will help your team, improve business processes and develop your skills
- Be solutions oriented in surfacing patterns, trends, and bugs to your Expert and Lead complete with a recommendation that might help resolve the issue
- Must be available for a regular schedule of 5 days work week (40 hours), mutually agreed with your Lead, able to work on weekends and public holidays
- Monitor money market funds trade orders as necessary into multiple trading platforms
- Serve as a liaison between Trust & RPS Operations and other teams within the division, including Trust Investments, Private Banking, Trust & RPS Sales & Service, and Risk & Compliance
- Complete client trade (custody) requests, recurring portfolio rebalancing,

## Qualifications for trust operations specialist

- Responsible for meeting with IRA clients and portfolio manager to review account investments, performance and to ensure the needs of the client are documented and being carried out
- Ensure all Required Minimum Distribution forms are completed and received by December 15th of each year
- Work closely with the Manager with regards to issues or concerns of the IRA clients and to ensure a seamless transition
- Coordinate with Portfolio Manager to resolve any investment related issues with the accounts
- Serve as the liaison between WAS administration and operations to ensure all real estate is accurately listed in all accounts
- Monitor all taxes, insurance, repairs, of real estate held in accounts to ensure the required appraisals, inspections and insurance and tax payments are completed timely and accurately