



Example of Trust Operations Specialist Job Description

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Our growing company is looking to fill the role of trust operations specialist. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for trust operations specialist

- Resolve internal inquiries accurately and expediently with a high level of internal customer service
- Communicate with internal contacts and external bank partners via phone, email, and fax to obtain information or required approvals for issues regarding tax payments
- Knowledge of where to find and understand agency requirements for payment submission and how to send Certificates of Mailing and prepare Fed Ex packages and labels
- Read and comprehend information in electronic (computer) or paper form (written / printed)
- On an as-needed basis, assist with using commercial paper cutter to size coupons, move file boxes, copying, filing and document storage processing
- Maintain counts and stats for metrics purposes
- Maintain compliance and minimize tax risks by following strict policies
- Partners with internal departments to resolve issues, remove barriers, and improve processes impacting the daily operation of the CTS business
- Ability to adapt to change and cross train on new systems
- Investigating buyer and seller claims and responding to them accordingly

Qualifications for trust operations specialist

- Proficient in use of desktop software products including Word and Excel
- Knowledge of operational and technological support for securities processing

- 5 years of trust and securities experience
- Requires thorough knowledge of terminologies, regulations and other accounting methods pertaining to Trust & Securities industry
- Payroll/HR experience is a plus