CUMBERLAND TRUST

Career Opportunity: *Trust Officer*

Full-time | Nashville, Tennessee

About the Position

The Trust Officer is an experienced fiduciary professional responsible for the administration of trust accounts in accordance with the terms specified in the trust instrument, while also providing superior customer service. The Trust Officer is responsible for maintaining client relationships through proactive client communication and the coordinated delivery of services to families.

Qualified candidates will live in the Nashville, Tennessee area for this hybrid position.

Job Duties:

- Responsible for the professional administration, management, and servicing of assigned trust accounts in accordance with the terms specified in the governing documents and applicable state law.
- Demonstrate a working knowledge of the interpretation and practical application of trust document provisions.
- Strive to deliver the highest service and client contact standards, including regular client communication and prompt responsiveness to client and advisor inquiries.
- Prepare necessary documentation and recommendation for Compliance Committee on any discretionary decisions to be made on behalf of beneficiary.
- Maintain proper files and documentation records.
- Coordinate with Administration Management and/or Cumberland Trust Fiduciary Counsel, as needed, to ensure administration is in accordance with governing documents and state law.
- Ensure all internal compliance and proper documentation requirements are met and consistent with internal fiduciary policies and procedures.
- Maintain an understanding of trust taxation and tax implications of trust distributions.
- In coordination and collaboration with the Special Assets team, monitor special assets to ensure compliance with internal fiduciary policies and procedures.
- Oversee and delegate administrative duties effectively, including internal processes, distributions, and cash management.
- Coordinate client requests for funds including regular remittances and disbursements.
- Monitor daily transactions posted to trust accounts to ensure accuracy.
- Properly document all account details and updates, as well as written and verbal communications with clients and advisors in Salesforce.
- Collaborate with the client's advisors, attorneys, and accountants, on complex administrative matters.
- Prepare 60-day and annual account reviews.
- Other duties as assigned.

Job Qualifications:

- Knowledge of trust taxation, fiduciary law, investment management as it relates to trusts.
- Excellent organization and time management skills.
- Detail oriented.
- Ability to work independently and with a team.
- Superior client relationship management skills.
- Strong communication skills.
- Occasional travel.
- Required to meet with advisors and their clients to discuss trust/estate plan issues.

Job Requirements:

- Bachelor's degree.
- 3-5 years of relevant experience in Trust Administration.
- Proficient computer skills, Microsoft Office Suite. (Word, PowerPoint, Outlook and Excel).

Work Environment:

- The position is in an office setting that involves everyday risks or discomforts that require normal safety precautions.

Interested in this position?

Cumberland Trust welcomes resume submissions from talented individuals. If you are interested in this career opportunity within our company, we'd love to hear from you.

Please submit your resume to resume@cumberlandtrust.com.

To learn more about Cumberland Trust, visit us online.