CUMBERLAND TRUST

Career Opportunity: *Trust Specialist*

Full-time | Nashville, Tennessee

About the Position

The Trust Specialist is a professional responsible for providing comprehensive administrative support to Trust Officers and Administrators. The candidate should have a pleasant demeanor, excellent organizational and time management skills, a strong work ethic, the ability to handle multiple projects with varying deadlines, effective communication skills, acute attention to detail, the ability to work as a team, and the proactiveness of a self-starter. This hybrid position is located in Nashville and qualified candidates will be living in or relocating to Nashville.

Job Duties:

- Provide comprehensive administrative support to Trust Officers and Administrators in the administration of trust accounts.
- Assist with account administration functions to ensure client satisfaction.
- Responsible for day-to-day handling of administrative tasks assigned by Trust Officers or Administrators, i.e., troubleshooting problems, working interdepartmentally on administrative issues, fielding client calls, preparing correspondences and working with trust advisors on account details.
- Master all systems related to the management of the trust accounts, i.e., Salesforce and Addvantage.
- Process transactions in a prompt matter, i.e., keying checks, ACHs, and wire transfers.
- Monitor cash management of trust accounts, including working in coordination with financial advisors to ensure that sufficient cash is on hand for upcoming client needs and to safeguard the accounts from falling into overdraft status.
- Maintain a basic understanding of the tax implications of trust distributions and is proficient in the use of AddVantage tax codes for incoming and outgoing funds.
- Input compliance and fiduciary due diligence requests into Salesforce for upcoming Compliance agenda.
- In the absence of a trust officer, answer phone calls and emails on behalf of the Trust Officer or Administrator, seeking guidance from other senior Trust Officers.
- Assist the Trust Officers and Administrators with preparation of client meeting agendas, Salesforce reports and account maintenance.
- Maintain proper files and documentation records.
- Other duties as assigned.

Job Qualifications:

- Ability to complete projects and tasks in a timely and accurate manner.
- Excellent customer service skills.
- Excellent written and verbal communication skills with a diverse range of individuals.
- Strong sense of initiative.
- Strong interpersonal skills.
- Problem solving skills.
- Good judgement.
- Excellent time management.
- Ability and willingness to work cooperatively with others.
- Keen eye for attention to detail.

Job Requirements:

- Prefer degree or relevant work experience.
- At least one year of experience within investment banking, trust administration, customer service or a related field.
- 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.