



## **Job Opportunity Posting**

Posting Date: 9/16/2021  
Post Expires: 10/7/2021  
Title: **Trust Associate**  
Grade: 18 -Exempt  
Department: Trust  
Posting Number: HR 21-09-3

## **Position Summary**

This position has the primary responsibility of providing quality administrative services and support to internal staff and existing clients of New Covenant Trust Company, N.A. which are primarily Presbyterian constituencies.

## **Scope & Breadth of Position**

This position reports directly to the VP, Director Trust Relationship Services of New Covenant Trust Company.

## **Accountabilities**

1. Assist in all stages of the administration of a client relationship to primarily support the Trust Officers through client contact (phone and email), new account creation, deposit and payment processing, tax information, client file maintenance, and account closing processes.
2. Work closely with Investment Officers, Business Development Officers, Compliance and Operations personnel to ensure that accounts are administered under the terms and conditions specified by clients and in compliance with policy and regulations.
3. Provide regular reports updating NCTC leadership on the status of client relationships and financial activity.
4. Attend training and professional programs necessary to maintain abilities and any previously earned accreditations.

## **Major Duties and Responsibilities**

1. With oversight from Trust Officers, prepares, and maintains, appropriate administrative and account records for Trust and Agency accounts including new account creation, client files, account reviews, deposits, payments, tax information, and account closings.
2. Provides excellent customer service to internal and external clients by submitting accurate and prompt account instructions and being responsive to needs in an open, pleasant, and professional manner.
3. Responsible for working with VP, Director of Trust Relationship Services in preparing appropriate administrative materials for Board meetings.
4. Serves as Acting Secretary for Trust Administration Committee. Includes working with VP, Director of Trust Relationship Services to set the agenda, communicate with internal staff, compile meeting minutes, and report approved minutes to Compliance.

### **Experience and Job-Related Requirements**

- College degree preferred with a preference for degrees in business and finance.
- At least 3-5 years of experience and thorough knowledge in the areas of trust administration and client service.
- Position requires strong attention to detail and excellent organization skills with ability to manage competing priorities.
- Position requires professional interpersonal skills inclusive of excellent oral and written communication.
- Strong technical skills with an ability and interest to learn new systems and processes.

### **Physical Requirements**

- Ability to verbally communicate with management, co-workers, and clients both individually and in a group/team setting. Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common.
- Hearing and vision within normal ranges is essential for normal conversations, to receive ordinary information and to prepare or inspect documents.
- No heavy lifting is expected. Exertion of up to 10 lbs. of force occasionally may be required.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.
- Good reasoning ability is required to solve a wide range of business problems.
- Able to apply statistical and mathematical calculations required.
- Ability to understand and utilize financial reports and legal documents to conduct business required.

### **Work Environment**

- The job is performed indoors in a traditional office setting.
- This position is based in the Jeffersonville, IN headquarters of NCTC.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.

**Forward resume to Lisa Pesavento**  
**[lisa.pesavento@presbyterianfoundation.org](mailto:lisa.pesavento@presbyterianfoundation.org)**  
**Attn: HR Posting #21-09-3**

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