



May 10, 2022

**FULL TIME PERSONAL TRUST
ADMINISTRATIVE ASSISTANT**

LOCATION:

Marinette WI

MAJOR ACCOUNTABILITIES:

Client Relationship Management Support – responsible for providing administrative support for trust officer including fielding/understanding client questions/requests, conducting research/problem solving, and utilizing trust accounting software to retrieve relevant information. Includes ability to handle routine client account functions independently in a timely and accurate manner, utilizing sound judgment in determining issues that require trust officer input. Responsible for conducting account transactions, except for investment purchases/sales, as directed by clients and/or trust officer.

Sales support – responsible for assisting all selling trust officers in administrative aspects of the sales process, including timely completion of required forms/file documentation, gathering of required client/asset information, and follow-through on outstanding items needed for booking the account.

Administrative support – responsible for assisting department administrative personnel via management of call reports and correspondence, maintaining client files and department files in a timely, accurate, and organized manner. Also responsible for various department operational and administrative functions including management of client public relations functions, coordination of department mailings, reviewing obituaries (if directed) to identify affected current and unfunded clients, and initiating action with a trust officer.

General department support – responsible for sorting mail including receiving/recording deposits, balancing of department checking account, client gift program administration, and boardroom & trust conference room monitoring & restocking. Assists in the opening/closing process for accounts opened by Officers not in the home office by doing those parts of the process that cannot be done remotely. Also, responsible for accurate and timely completion of various special projects as assigned.

QUALIFICATIONS:

High school graduate, with an associate degree in a relevant field preferred. Have excellent customer service skills, PC skills, high attention to detail, and basic knowledge of investments. Ability to work closely as part of a team. Good communication skills and excellent listening skills required. Ability to carry out directions in a thorough, accurate, and timely fashion. Ability to handle and prioritize multiple tasks.

Equal Opportunity Employer

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