



May 10, 2022

FULL TIME PERSONAL TRUST OFFICER

LOCATION:

Marinette WI or Green Bay WI or Marquette MI

MAJOR ACCOUNTABILITIES:

Trust Client Relationship Management – responsible for retaining, servicing, and growing current client relationships including investment management accounts, IRAs, and various types of personal trust accounts. Accountable for properly following trust documents, applying proper tax analysis, and following applicable laws, regulations, and SNBT Policies.

Client Sales – responsible for acquiring new client relationships and generating referrals to other areas of the bank.

Estate Administration – responsible for administering probate and trust estates in their entirety. Trust Income Tax Documents – responsible for oversight of annual tax information processing for fiduciary accounts, preparation of required grantor 1041 returns, and management (with Trust Operations) of tax vendor relationship for preparation of irrevocable trust tax returns.

Investment Oversight – responsible for implementation and ongoing monitoring of cash and allocations in assigned accounts. Responsible for participation in Trust Investment Committee, as well as ensuring product and investment changes/ideas are communicated to clients.

QUALIFICATIONS:

A degree in finance/business/law/accounting is preferred. Prior experience in trust & investments is required. Professional designations, such as the CFP, CPA, CFA, or CTFA, are strongly desired. Strong interpersonal, problem solving, and analytical skills are required. Good written and oral communication skills are required. Excellent customer service and PC skills are required. Ability to develop a working relationship with referral sources (both external and internal), interact on a high level with other area professionals, and become an integral part of the overall bank team is required.

Equal Opportunity Employer

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