JOB TITLE: **Trust Administrator**

REPORTS TO: **Trust Operations Manager**

DEPARTMENT: **Trust Department**

Position Summary: A motivated, team player providing comprehensive support to Trust Officers in operational, administrative, and relationship management activities. Represent the Trust Department and the Bank professionally and competently in a client-facing role based in the Trust Services office in Norwich. Assure client confidentiality and quality work product through adherence to all policies and procedures. Increase subject matter knowledge and relationship management skills to grow into roles of increasing responsibility and opportunity.

Functions:

- Provide operational and administrative support to Department customers and the Trust Officers by:
- Delivering outstanding service experiences when interacting with customers, prospective customers, outside advisors, and internal Bank partners in written, electronic, telephone, and in-person communications.
- Ensuring accuracy and timeliness in the creation, preparation, and processing of reports, transaction reconciliation, files and documents, including but not limited to:
    - Customer files
    - New business statistics
    - Monthly production reports
    - Trust security trades
    - Daily recordkeeping activities
    - Maintaining files, documents, and records in compliance with regulatory and bank policies and procedures.
    - Generating correspondence.
    - Assisting with the marshaling, management, and transfer of securities and other assets.
    - Compiling information for preparation of various tax and legal filings.
    - Assisting with the administration of client estates and trusts.
    - Prioritizing all of the above activities with feedback from Trust Officers.
- Adhering to bank, state and federal guidelines for compliance with policies and procedures.

- Provide daily Departmental functions support, which may include account set-up, processing and balancing of transactions, reviewing transactions for accuracy, and adherence to compliance requirements.
- Participation in business development opportunities as appropriate including building outside referral sources and developing subject matter expertise.
- Assist in the coordination of activities of the Trust Officers with other departments and branches of the bank.
- Perform other duties as may be required from time to time by management, including potential travel outside the office for business purposes.

Knowledge, Skills, Requirements:

- Knowledge of state and federal regulations and compliance guidelines.
- Strong attention to detail; efficient, well-organized, and accurate.
- Ability to work in a fast-paced environment and meet defined deadlines.
- Professionalism in appearance and demeanor.
- Basic knowledge of wealth management terminology and financial and estate planning concepts.
- Self-motivation and ability to work independently and proactively.
- Excellent interaction with customers and coworkers.
- Excellent verbal and written communications skills.
- Experience in customer service settings, specifically in the financial and/or legal services sector.
- Proficiency with Windows Office, Outlook, Excel, as well as other basic computer skills.
- Perform duties of the position with strict adherence to all bank policies and in respect for customer privacy.
- Complete courses, training, and licensing, as may be required for successful completion of responsibilities and progression within the Department.

Physical Demands/Conditions Requirements:

- General office environment

Equipment Used:

- General office equipment, i.e., calculator, photocopier, etc.
- Computer

ADA: The employer will make reasonable accommodations in compliance with the Americans with Disabilities Act of 1990.

Hiring Manager Contact Information:

Brian Kosovsky
Assistant Vice President
Trust Operations Manager
Dime Bank
290 Salem Tpke
Norwich, CT 06360
Email: bkosovsky@dime-bank.com
Telephone: 860.859.4340
Facsimile: 860.823.1787