



THE NATIONAL  
BANK OF INDIANAPOLIS

## **The National Bank of Indianapolis** **Job Posting: Fiduciary Tax Officer**

### **A Stable and Growing Employer**

The National Bank of Indianapolis is the largest, locally owned, national bank in greater Indianapolis. Since opening our doors in 1993, we have grown from 18 employees to more than 330 employees. Our strength and success in serving the local market is directly attributable to our talented staff. With greater than 90% staff retention year after year, and with a highly competitive benefit package, our staff enjoy a sense of stability not always experienced in the general work environment. Benefits include but are not limited to: medical/dental/vision/life insurance, vacation, personal time, holidays, tuition reimbursement, 401(k), profit sharing, and wellness benefits.

### **Who We Are Looking For**

The National Bank of Indianapolis has assembled our talented staff by hiring only the best, whether highly experienced professionals or those just entering the workforce. We are looking for those who are committed to delivering superior service to our clients and superior teamwork to their co-workers. Along with the relevant knowledge and experience, The National Bank of Indianapolis requires its employees to have both a high degree of professionalism and a commitment to excellence.

### **How to Apply**

To express interest in an open position at the Bank, please email your resume to [Resumes@NBofI.com](mailto:Resumes@NBofI.com) or call 317/261-3271.

**We invite you to learn more about The National Bank of Indianapolis at**  
<http://nbofi.com/careers.php>

**The National Bank of Indianapolis is an Equal Opportunity Employer**  
**(Minority/Female/Disability/Veteran)**





## **JOB POSTING**

**Position: Fiduciary Tax Officer**

**Department: Trust Legal, Tax & Estates**

### **Purpose of Position:**

Responsible for preparing fiduciary income tax returns and Forms 1099 for trust and agency accounts in the Wealth Management Division. The incumbent provides the highest quality of service to every client.

### **Essential Functions:**

- ◆ Prepares fiduciary income tax returns and forms 1099 for review, including but not limited to organizing, scrubbing and preparing tax data and setting up new account tax information within the system
- ◆ Computes quarterly fiduciary estimated tax
- ◆ Prepares federal estate tax returns for review
- ◆ May prepare estate inventories and accountings
- ◆ Reviews date of death valuations of securities and cost basis adjustments
- ◆ Prepares decedent's individual income tax returns for review
- ◆ Corresponds with and resolves issue with IRS and IDR
- ◆ Coordinates individual income tax returns with outside preparers

### **Requirements:**

- ◆ Bachelor's degree or equivalent work experience; an undergraduate degree in accounting is preferred and helpful
- ◆ Minimum of five years of experience preparing fiduciary tax returns
- ◆ High level of initiative, and the ability to work with minimal direct supervision
- ◆ High degree of accuracy and attention to detail
- ◆ Ability to interpret data and solve problems
- ◆ Ability to organize and prioritize tasks
- ◆ Computer proficiency, especially with Microsoft Excel and Access; experience using OneSource Trust Tax software system is a plus
- ◆ Proven verbal and written communication skills, with strong emphasis placed on responsiveness and customer service skills
- ◆ Excellent interpersonal skills, exhibiting a high degree of professionalism
- ◆ Strong team orientation and demonstrated work ethic

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