THE NATIONAL BANK of INDIANAPOLIS

The National Bank of Indianapolis
Job Posting: Trust 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 300 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 coworkers. 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 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)

THE NATIONAL BANK of INDIANAPOLIS

JOB POSTING
Position: Trust Officer

Purpose of Position:
Responsible for providing high net worth clients with professional trust and related account administration services. The incumbent provides the highest quality of service to every customer.

Essential Functions include, but are not limited to:
- Opens and closes accounts and provides account administration services for trusts, estates, guardianship accounts, fiduciary agency accounts, charitable accounts, custody accounts and investment management accounts
- Researches legal and/or tax issues, communicating with tax advisors, legal counsel and agencies as appropriate
- Responds to client questions regarding investments and coordinates with investment advisors as appropriate
- Coordinates family and personal care issues consistent with trust or related account instructions
- Coordinates with appraisers, agents and property managers to ensure that real estate properties are handled in accordance with client wishes; ensures properties are maintained or sold and, when applicable, rent is collected
- Monitors trust and related account activities and cash balances; handles check, deposit and distribution requests timely and accurately
- Reviews fee calculations and billing for accuracy
- Meets regularly with clients and portfolio managers to facilitate account administration and ensure the highest level of service is provided clients
- Administers account as appropriate upon the death of the client
- Responsible for meeting with prospective clients and for developing new business; establishes and/or maintains relationships with centers of influence
- Cultivate relationships with clients and prospects through regular contact, client events and Bank entertainment opportunities (during normal business hours as well as after hours), and routine follow up
- Supervises a Client Support Manager (as assigned) by directing, coaching and otherwise providing quality supervision in accordance with established human resource policies and procedures in order to ensure a productive work environment
- Participates in Superior Service Teams with Private Banking, Corporate Banking and Nonprofit Services; serves as a liaison between Wealth Management, Banking Centers, and other departments to facilitate superior client service

Requirements:
- College degree in related discipline and/or equivalent years of experience in the industry preferred
- Proven knowledge of trust administration as demonstrated by three to five years of experience serving as a trust administrator
- Professional designations (CTFA, CFP) highly desirable; special needs trust and guardianship knowledge preferred
- Proven track record working effectively with outside centers of influence to build relationships, garner referrals and develop business
- Demonstrated familiarity with applicable laws and regulations
- Prior supervisory experience preferred
- High degree of accuracy and attention to detail; ability to organize and prioritize tasks
- Ability to interpret data and problem solve
- Excellent customer service skills, with strong emphasis placed on responsiveness
- Proven interpersonal and communication skills (written and verbal), exhibiting a high degree of professionalism
- Experience with and good working knowledge of standard computer applications, including Word and Excel

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