Personal Trust Assistant

The Trust and Wealth Management Group of Reid and Riege, P.C. is seeking a self-motivated individual to provide administrative support and project work for the team. This position will assist with the day to day administrative responsibilities required to provide superior customer service to our high net worth clients.

Primary Duties:

- Respond to client requests for information on a same day basis or similarly appropriate time frame.
- Process routine and non-routine transactions, including client bill-paying, account maintenance, scheduling, insurance matters, gifting programs, and other tasks, as directed.
- Monitor cash positions and work with outside investment advisors to ensure cash balances are appropriate to meet scheduled disbursements.
- Process client account openings, and closings.
- Oversee asset transfers and assist with tax cost research.
- Assist clients and their other advisors by telephone, email and in writing.
- Gather tax information for the completion of trust 1041s and client 1040s.
- Prepare materials for client meetings.

Qualifications:

- Bachelors degree
- 3-5 years previous experience in financial services, preferably in a bank trust environment.
- The qualified candidate must be an independent self-starter with excellent interpersonal, written and verbal communication skills, and client service skills.
- Candidate must be a professional, enthusiastic and friendly team member with strong attention to details.
- We are looking for an individual who is extremely organized and able to handle multiple tasks in a fast-paced environment.
- Strong PC skills including Word, Excel and Power Point are a must.

Reid and Riege, P.C is an equal opportunity employer dedicated to workforce diversity. Interested candidates should submit a cover letter with your resume to:

Sandra Dickerson, Administrative Manager
sdickerson@rrlawpc.com