The Community Bank is expanding our Community Financial Advisors-Wealth Management Team!!
Vice President -Trust Officer

Summary of Position

Community Bank is seeking a Vice President-Trust Officer as part of the Community Financial Advisors- Wealth Management Team. The Trust Officer is responsible for the ongoing administration of a select book of client relationships, primarily consisting of fiduciary accounts for which Community Bank / Community Financial Trust and Estate Services (CFTE) serves as Trustee and/or Executor. The Trust Officer will not be expected to engage in sales/production activities; however, an aggressive referral incentive plan exists.

Essential Duties and Responsibilities:

- Acting as the relationship manager of CFTE trust and estate engagements.
- Overseeing the administration of trusts and estates in accordance with the applicable governing instrument(s) and relevant law.
- Reviewing legal instruments including trusts, wills, and other ancillary documentation.
- Interacting with attorneys and tax advisors regarding trust and estate planning matters.
- Managing disbursement requests and approvals for daily trust activities.
- Coordinating the account acceptance process and onboarding of new trust clients.
- Complete and present annual trust reviews to the Community Bank-Trust Oversight Committee.
- Assisting tax preparers with annual fiduciary return preparation, ensuring tax compliance, and coordinating quarterly tax payments.
- Collaborate with other Wealth Management team members.
- Follows and supports the Company’s policies and procedures accurately.
- Positively represents the Company’s culture and values.
- Achieves annual goals as assigned.
- Completes annual required regulatory and Cybersecurity training curriculums as assigned.

Qualifications

- Have a bachelor’s degree and preferably an advanced degree in finance, tax or law.
- Have 3+ years of experience administering trust accounts.
- Professional designation (JD, CTFA, CFP) and/or Cannon Trust School graduate is preferred.
- Have extensive knowledge of trust administration, fiduciary accounting, and trust reporting standards.
- Are well-organized and deadline driven.
- Have experience working with high-net worth clients and their intermediaries and advisors.
- Have experience working with a trust accounting system.

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Compensation

- Salary commensurate with experience.
- Initial and recurring incentive compensation.
- Prefer a full-time (5 days a week) position, but we are willing to consider a part-time position.

Reporting and Contact Information

The position will report to the Sr. Financial Officer and the Sr. Trust Officer.

If you are interested in applying for the position or would like additional information, please contact Human Resources at 740-454-1600 or Ron Davis at 740-453-0620 (rdavis@thecommunityadvisors.com).