Client Service Associate

Full-time | Houston, Texas

At Sentinel Trust, we pride ourselves in providing our families with an exemplary level of personalized service. As a Client Service Associate, you will be a member of the Client Service team and work closely with a Senior Relationship Officer and a Client Relationship Officer to:

- Facilitate the delivery of high quality family office, investment advisory, and fiduciary administration services for a portfolio of families.
- Process and document deposit and disbursement transactions for selected clients.
- Coordinate materials for client meetings and presentations and prepare reports and account opening/closing documentations in a professional and organized manner.
- Adapt to changing situations and resolve challenging issues calmly and effectively.
- Maintain a sensitivity towards our clients' need for confidentiality.

Other tasks you will be responsible for as a Client Service Associate are:

- Calculating and preparing asset and gift transactions and oversees transfer process.
- Reviewing documents associated with the client's last will and testament, insurance policies, unpaid bills, and trust agreements to assist with the distribution of property, debt payments (including taxes) and other administration of estate monies.
- Handling client service administrative matters, including telephone calls and e-mails with clients, prospects, and business associates; creating and editing written correspondence; assisting with time management and scheduling; organizing travel; handling certain incoming and outgoing mail; maintaining files; and other client administrative matters, as requested.
- Developing and maintaining a high level of expertise in specialized investment and trust software including Axys and TrustRite and uses this expertise to create accurate custom reports and to process transactions in a time-sensitive manner.
- Proactively assisting with process improvement and compliance efforts.

Skills that are an asset to the success as a Client Service Associate include:

- Well-developed critical thinking, deductive reasoning, and problem-solving skills.
- An affinity for researching unique questions, often of a legal or financial nature.
- Polished written and oral communication skills.

- Effective project management skills and ability to manage multiple priorities and cross-functional teams.
- People management and influencing experience.
- An aptitude for working collaboratively and efficiently with a wide range of external stakeholders, professional service providers, and vendors.
- Self-motivation with a strong sense of accountability.

Desired qualifications to apply for this position:

- Bachelor’s degree preferred, or a minimum of 5+ years’ related experience in an investment management or trust environment.
- At least one year of banking experience required, preferably as a bank teller.
- Familiarity with investment (Advent Axys) and trust accounting (TrustRite) software is a plus.
- Business level use of Microsoft Office products, include Word, PowerPoint, Outlook, and Excel is required.
- Acceptable results on background tests.

Please send your resume to humanresources@sentineltrust.com to apply.