



Senior Relationship Officer

Full-time | Houston, Texas

At Sentinel Trust, we pride ourselves in providing our families with an exemplary level of personalized service. As a Senior Relationship Officer, you will serve as the primary point of contact for several individual client families and lead a team responsible for executing the dayto-day deliverables of client service, including relationship management, account administration, and fiduciary administration.

Key functions of this position include:

- · Leading others and serving as a resource to thoughtfully, timely, and without error:
 - · On-board new clients
 - · Support client relationships and proactively identify and resolve client issues
 - Administer accounts and perform fiduciary oversight functions
 - Coordinate the delivery of services (internal and external specialists)
 - · Prepare and deliver client communications
- · Developing an in-depth understanding of client preferences, needs, and concerns, and using that understanding to craft recommendations and deliver timely and creative solutions.
- · Interfacing effectively with clients, prospects, and centers of influence to demonstrate the firm's value proposition to support business development and client retention efforts.
- · Managing a variety of accounting-related functions, including:
 - · Deposit and disbursement transactions
 - · Budgets
 - · Preparation and filing of tax returns
 - · Financial statement analysis
 - · Financial transaction reviews
 - Fees and expenses
- · Providing trust, estate, and wealth transfer planning advice.
- · Engaging in high level trust administration.



- · Performing risk management activities for assigned client families.
- · Interpreting wills, trusts, and other legal documents.
- · Working cross-functionally within the firm to ensure efficient workflows and the maximization of resources firm-wide.
- Creating and maintaining an active network of peers and subject-matter experts to harvest ideas and to cultivate potential
 professional relationships.
- · Fostering positive employee relations and championing the firm's strategic priorities, objectives, and policies.

Skills that would be an asset to this position include:

- · Self-motivation with a strong sense of initiative and accountability.
- · The ability to quickly adapt to change and skillfully address setbacks or ambiguity.
- · Business and financial acumen with an understanding of the firm's objectives, operations, and market environment.
- An aptitude for building relationships, improving team efficiency, and working collaboratively with a wide range of external stakeholders, professional service providers, and vendors.
- A keen eye towards discovering and meeting clients' stated or unstated needs and expectations.
- · Polished written and oral communication skills.
- · Well-developed critical thinking, deductive reasoning, and innovative problem-solving skills.
- · People management and influencing experience.
- A demonstrated ability to timely manage multiple priorities and cross-functional teams.

Desired qualifications to apply for this position:

- · JD or CPA required.
- · CFP® designation strongly preferred.
- · Previous experience and demonstrated success leading client relationships in an entrepreneurial environment required.
- Business-level use of Microsoft Office products, including Word, PowerPoint, Outlook, and Excel, and proficiency with Adobe Acrobat is required.
- · Acceptable results on background tests.

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