



## Job Opportunity Posting

Posting Date:	5/10/2023
Removal Date:	5/17/2023
Title:	<b>NCTC Trust Associate</b>
Grade:	18 Exempt
Department:	Trust
Preferred Location:	Louisville Metro
Posting Number:	HR 23-5-02

## Position Summary

This position has the primary responsibility of providing quality service and support to internal staff and existing clients of New Covenant Trust Company, N.A. which are primarily Presbyterian constituencies.

## Scope & Breadth of Position

This position reports directly to the Vice President, Director Trust Relationship Services of New Covenant Trust Company.

## Essential Job Accountabilities

- Assist in all stages of the accounting and administration of a client relationship in coordination with the Client Engagement Team and Trust Officers through client contact (phone and email), new account creation, deposit and payment processing, tax information, client file maintenance, and account closing processes.
- Work closely with Investment Team, Client Engagement Team, Compliance and Operations personnel to ensure that accounts are administered under the terms and conditions specified by clients and in compliance with policy and regulations.
- Responsible for Board communications, planning, materials, and minutes.
- Attend training and professional programs necessary to maintain abilities and any previously earned accreditations.

## Relationships

- Prepares, and maintains, appropriate administrative and account records for Trust and Agency accounts including new account creation, client files, account reviews, deposits, payments, tax information, and account closings.
- Provides excellent customer service to internal and external clients by submitting accurate and prompt account instructions and being responsive to needs in an open, pleasant, and professional manner.
- Responsible for working with President, Executive Vice President and Vice President, Director of Trust Relationship Services in preparing appropriate communications and administrative materials for Board meetings.

### Experience and Job-Related Requirements

- College degree preferred with a preference for degrees in business and finance.
- Position requires strong attention to detail and excellent organization skills with ability to manage competing priorities.
- Position requires professional interpersonal skills inclusive of excellent oral and written communication.
- Strong technical skills with an ability and interest to learn new systems and processes.
- Client service experience preferred.

### Physical Requirements

- Ability to verbally communicate with management, co-workers, and clients both individually and in a group/team setting. Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common.
- Hearing and vision within normal ranges is essential for normal conversations, to receive ordinary information and to prepare or inspect documents.
- No heavy lifting is expected. Exertion of up to 10 lbs. of force occasionally may be required.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.
- Good reasoning ability is required to solve a wide range of business problems.
- Able to apply statistical and mathematical calculations required.
- Ability to understand and utilize financial reports and legal documents to conduct business required.

### Work Environment

- The job is performed indoors in a traditional office setting.
- This position is based in the Jeffersonville, IN headquarters of NCTC.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.

**Forward resume to Yveshia Klingman**  
[Yveshia.Klingman@presbyterianfoundation.org](mailto:Yveshia.Klingman@presbyterianfoundation.org)  
**Attn: HR Posting #23-5-02**

***“The Presbyterian Foundation is an Equal Opportunity Employer”***