



## **Job Opportunity Posting: Assistant Vice President – Trust Services Lead**

### **Position Summary**

Leads, manages, and holds accountable a team that directs and coordinates activities nationally for assigned accounts relative to creating and administering charitable trusts, personal trusts, IRAs and investment management accounts in accordance with the terms that created it (i.e., trust agreement, will, court order, or contract).

### **Scope & Breadth of Position**

This position reports directly to the VP, Director Trust Relationship Services of New Covenant Trust Company (NCTC). Reporting to this position are the AVP Trust Officer, Trust Officers, and Trust Associates.

### **Accountabilities**

- Leads, manages, and holds accountable the AVP Trust Officer, Trust Officers, and Trust Associates.
- Sets team and individual goals, working with direct reports to monitor progress against goals.
- Participates with the Client Engagement Team and the VP, Director Trust Relationship Services in the decisions about accepting new business types.
- Assigns Trust Officers for new business with accountability to accept new accounts according to Board policies.
- Works closely with the VP, Director Trust Relationship Services in making decisions affecting the ongoing administration of trust and investment management accounts, decisions about the creation and/or operation of the trust/investment management account infrastructure within the organization.
- Assists VP, Director Trust Relationship Services with development and execution of operational policy and procedures and projects as needed.

### **Relationships**

The AVP Trust Services Lead must work closely with the VP, Director Trust Relationship Services to foster and maintain effective relationships with all Foundation and NCTC staff. The AVP Trust Services Lead also serves as the liaison coordinating the team of departmental personnel from legal, investment, tax, client engagement, and operations to facilitate the creation and administration of the trust/investment management account. The AVP Trust Services Lead is the alternative contact for each client and may have individual client relationships as well.

### **Major Duties and Responsibilities**

This is a leadership position that is an integral part of the organization. This position sets team and direct report goals that are aligned with the mission, vision and strategy of NCTC. This position ensures the effective and efficient operation of the team. Core responsibilities include building a collaborative team that works and functions well together. The AVP Trust Services Lead has the responsibility for accepting new business and is responsible for the ongoing trust administration within the organization. The AVP Trust Services Lead must have extensive knowledge of trust accounting and the laws, regulations and administration of trusts, investment management accounts and IRAs.

## Experience and Job-Related Requirements

- College degree required
- Minimum of 5 years' experience in trust company/department/ human resource management preferred
- Strategic vision and leadership ability
- Certified Trust Financial Advisor (CTFA) certification is desirable
- Must have extensive knowledge of laws and regulations regarding trusts and investment management services
- Competence in estate planning, trust tax return preparation, and charitable giving issues
- Excellent people skills required
- Ability to respond to emerging needs, work on many diverse projects, and coordinate with diverse groups
- Excellent oral and written communication skills
- Proven organizational skills in computers, research, administrative and financial experience, specific planned giving vehicles, and tax benefits of outright and deferred gifts
- Strong commitment to details regarding legal, tax, charitable giving options
- Dedication to researching and pursuing legal/business decision-making in light of establishing trusts with NCTC, including reviewing trusts for potential business or legal problems and resolving those issues with the correct personnel
- Must be able to work well with inside and outside clients utilizing oral and written communications skills
- Possess the ability to plan well and to handle multiple tasks

## Physical Requirements

- Ability to communicate orally with management and co-workers, both individually and in a group/team.
- No heavy lifting is expected. Exertion of up to 10 pounds of force occasionally may be required.
- Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common with extensive work at a computer monitor and/or calculator.
- Hearing and vision within normal ranges is essential for normal conversations to receive ordinary information and to prepare or inspect documents.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.

## Work Environment

- Job is performed indoors in a traditional office setting.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or calculator.

**Forward resume to Yveshia Klingman**  
**[Yveshia.Klingman@presbyterianfoundation.org](mailto:Yveshia.Klingman@presbyterianfoundation.org)**  
**Attn: HR Posting #23-10-03**

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