



We share your faith
and your values.

We're your trust company.

TRUST ASSISTANT

Jeffersonville, Ind.

POSITION OVERVIEW

This position is responsible for providing quality service and support to the staff and clients of New Covenant Trust Company (NCTC), from communication to new account creation, payment processing, and file maintenance. This role is also responsible for the accurate and timely creation of new accounts and relationships in the trust accounting system, online viewing system and client relationship management system.

ABOUT US

NCTC empowers churches, church institutions and church members to create and sustain healthy and vibrant ministries through faithful stewardship of their investments. A subsidiary of the Presbyterian Foundation — America's second-oldest charitable foundation, founded in 1799 — NCTC was established in 1998 to offer full-service financial planning, investment management and trust services. Our purpose is driven by the shared faith, values and integrity of the Presbyterian Church (U.S.A.).

We are passionate about taking exceptional care of each and every client while advancing the mission of the church. As a limited purpose national bank federally regulated by the Office of the Comptroller of the Currency (OCC), we are the trusted fiduciary partner our clients rely on. We've experienced tremendous growth over the past decade, with assets under management increasing from \$47 million to over \$600 million. NCTC is now focused on future expansion of our services to help even more churches thrive.

WHY NCTC?

WE VALUE OUR PEOPLE

NCTC embraces a person-centric philosophy because we know that our team members are our greatest assets.

WE OFFER EXCEPTIONAL BENEFITS

We offer a highly affordable health insurance plan, generous paid vacation time, and an outstanding overall benefits package.

WE PROVIDE GROWTH OPPORTUNITIES

An expanding firm that promotes from within, you will have the chance to grow with us, and play a pivotal role in NCTC's strategic direction.

OUR CULTURE IS VALUES-DRIVEN

Our culture is rooted in integrity, collaboration, and servant leadership, thanks to our focus on shared values and a purpose greater than ourselves.

WORK/LIFE BALANCE IS OUR PRIORITY

We offer a flexible, hybrid work environment that's designed to promote work-life balance and put people above profit.



See next page for the full job description and instructions on how to apply.

TRUST ASSISTANT JOB DESCRIPTION

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.

SALARY

\$40,000-\$45,000 annually

SCOPE & BREADTH OF POSITION

This position reports directly to the Trust Services Manager.

ACCOUNTABILITIES

1. Primarily supports the Trust Officers, Administrative Officer, and Client Engagement team throughout the administration of the client life cycle, which includes client contact (phone and email), new account creation, deposit and payment processing, and client file maintenance.
2. Responsible for the accurate and timely creation of new accounts and relationships in the trust accounting system, online viewing system, and client relationship management system.

MAJOR DUTIES AND RESPONSIBILITIES

- Prepares and maintains appropriate administrative and account records for Trust and Agency accounts including new account creation, client files, deposits, payments, and tax information.
- 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 answering incoming client phone calls and providing excellent customer service.
- Responsible for the creation of client review materials in conjunction with the Client Engagement team.

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 organizational 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, Ind., headquarters of NCTC.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.

To apply, forward your résumé to Yveshia Klingman at
Yveshia.Klingman@presbyterianfoundation.org
Attn: HR Posting #24-07-08

The Presbyterian Church (U.S.A.) Foundation, along with its subsidiary New Covenant Trust Company, is an Equal Opportunity Employer. We provide equal opportunities in all employment positions, regardless of age (as defined in the Age Discrimination in Employment Act), disability, sex, national origin, race, color, creed, religion, sexual orientation, gender identity, gender expression, or veteran status.



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newcovenanttrust.com