

SENIOR TRUST OFFICER & TEAM LEAD

Jeffersonville, Ind.

POSITION OVERVIEW

This position 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.

ABOUT US

New Covenant Trust Company (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 $1 billion. 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

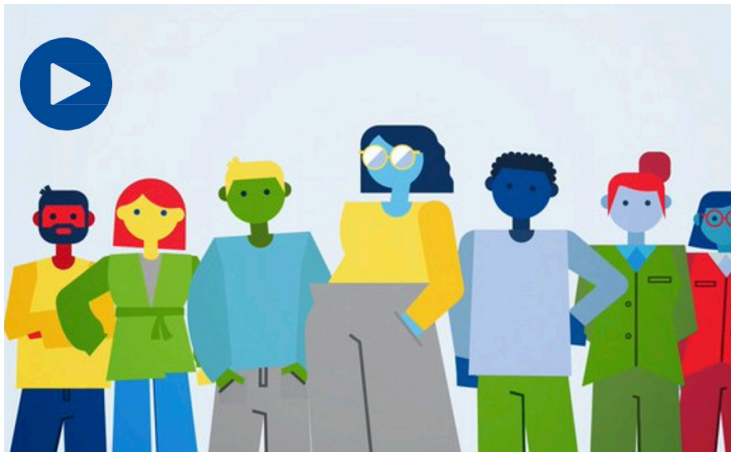
An expanding firm that promotes from within, you will have the chance to grow with us, and play a pivotal role in NCTC's strategic direction.

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.

NEW COVENANT TRUST
A Subsidiary of the Presbyterian Foundation

200 E. 12th Street | Jeffersonville, IN 47130
trustservices@presbyterianfoundation.org | 800-858-6127, Option 6

newcovenanttrust.com

SENIOR TRUST OFFICER & TEAM LEAD

SCOPE & BREADTH OF POSITION

This position reports directly to the VP, Director Trust Relationship Services. The Senior Trust Officer & Team Lead has direct leadership responsibility for Trust Officers and oversees trust administration activities across assigned accounts nationwide.

SALARY & HIRING BONUS

- $140,000-$148,000 annually
- Candidates holding an active LLM or CPA designation are eligible for a hiring bonus.

ACCOUNTABILITIES

- Provide leadership, supervision and accountability for Trust Officers.
- Establish team and individual performance goals; partner with direct reports to track progress and outcomes.
- Collaborate with the Client Engagement Team and the VP, Director Trust Relationship Services on decisions related to the acceptance of new business.
- Assign Trust Officers to new accounts and ensure new business is accepted and onboarded in accordance with Board-approved policies.
- Works closely with the VP, Director Trust Relationship Services on decisions impacting account administration, as well as the development and operation of internal infrastructure supporting those services.
- Support the development, implementation and execution of operational policies, procedures and special projects as needed.

MAJOR DUTIES AND RESPONSIBILITIES

This leadership role is a critical component of NCTC's organizational structure. The Senior Trust Officer & Team Lead sets and aligns team and individual goals with NCTC's mission, vision and strategic objectives and ensures the effective and efficient operation of trust services.

Core responsibilities include building and sustaining a collaborative, high-performing team, overseeing acceptance of new business, and ensuring consistent, high-quality trust administration across the organization. The Senior Trust Officer & Team Lead must possess extensive knowledge of trust accounting, trust and estate law, regulatory requirements, and the administration of trusts, IRAs and investment management accounts.

RELATIONSHIPS

The Senior Trust Officer & Team Lead works closely with the VP, Director of Trust Relationship Services to cultivate strong working relationships across NCTC and the Presbyterian Foundation. This role serves as a key liaison, coordinating efforts among legal, investment, tax, client engagement and operations teams to support the creation and administration of trust and investment management accounts.

The Senior Trust Officer & Team Lead also serves as an alternate point of contact for clients and may independently manage select client relationships.

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EXPERIENCE & JOB-RELATED REQUIREMENTS

- Juris Doctor (JD) required; LLM or CPA preferred but not required
- Certified Trust Financial Advisor (CTFA) certification desirable
- Minimum of five years of experience in trust company environment or trust and estate planning practice preferred
- Demonstrated strategic vision and leadership capability
- Extensive knowledge of law and regulations governing trusts, IRAs and investment management services
- Expertise in estate planning, trust taxation and charitable giving strategies
- Strong interpersonal and relationship building skills
- Ability to manage multiple priorities, respond to evolving needs, and collaborate across diverse teams
- Excellent written and verbal communication skills
- Proven organizational, research, administrative and financial competency, including familiarity with planned giving vehicles and tax implications of both outright and deferred gifts
- High attention to detail and commitment to accuracy in legal, tax and charitable giving matters
- Dedication to thorough analysis and sound legal and business decision making related to trust acceptance and administration
- Ability to effectively engage with internal and external clients using clear and professional communication

PHYSICAL REQUIREMENTS

- Ability to communicate effectively in one-on-one and group settings with management, colleagues, constituents and the public
- Frequent use of telephone and email communication
- Ability to sit for extended periods of time
- Normal hearing and vision required for verbal communication and document review
- Minimal physical exertion required; occasional lifting of up to 10 pounds
- Manual dexterity sufficient for regular use of office equipment including computers, telephones and copiers.

WORK ENVIRONMENT

- The job is performed indoors in a traditional indoor office setting.
- Activities include extended periods of sitting and frequent use of computers and other office equipment.

To apply, forward your résumé to Yveshia Berthiaume at

Yveshia.Berthiaume@presbyterianfoundation.org

Attn: HR Posting #HR 26-05-05

The Presbyterian Church (U.S.A.) Foundation, along with its subsidiary New Covenant Trust Company (NCTC), are Equal Opportunity Employers. 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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