Why We Exist

At the Trust Company of Tennessee, we believe everyone can live confidently and reach their financial goals. Would you like to be part of a team that works with individuals, families, businesses, and foundations to identify what success looks like and formulate a plan to get there? Come join our team of Wealth Management, Trust, Estate Administration, and Corporate Retirement Plan professionals who proudly help clients achieve their dreams.

Job Title: Client Service Associate
Reports To: RM Team Lead or Executive
Approved By: Personnel Strategy
Classification: Full Time – Non-Exempt

Core Purpose

The Client Service Associate provides support to a team of Relationship Managers and Client Specialists who manage a portfolio of client relationships. This position also serves as a liaison between the Client Service Team and the Operations team.

Responsibilities

- Shows a commitment to The Trust Company's Mission, Core Values, and Client Promise.
- Assists Client Service Team by managing and organizing calendars – including scheduling client meetings on behalf of the Client Service Team.
- Prepares reports, correspondence, and documents for client, prospect, and COI meetings.
- Actively participates in meetings with supported officers providing updates on recent client servicing requests, resolution of documentation exceptions, breaks in service causing client impact, tracking of upcoming tasks/relationship reviews/financial information requests for ongoing portfolio servicing.
- Anticipates Client Service Team or client needs and proactively undertakes administrative tasks to meet those needs to provide a high-level of customer service.
- Processes and ensures accuracy of documentation for new and existing account relationships, including but not limited to entering client relationship information and financial information, and completion of relationship summary.
- Tracks and maintains annual meeting goals for assigned Client Service Team.
- Serves as a secondary point of contact for clients when client service team members are out of the office.
- Maintains and builds trusted relationships with clients of assigned Client Service Team.
- Proactively manages team members to ensure follow-up letters and other tasks are being completed timely.
- Requests trades based on instructions from Client Service Team – including buys, sells, and rebalances.
- Sets up new accounts and contacts, reviews accounts for accuracy, and resolves any issues within the trust management system and Salentica CRM system.
- Creates distributions from accounts, may pay bills for clients, and keep record of bills paid.
- Provides friendly, professional, and personal service to clients when responding to requests via telephone, mail, or email.
- Provides reporting essential to measuring the productivity of the Client Service Team such as but not limited to follow-up letter tracking.
- Participates in ongoing learning and development to enhance support of TTC's business.
- Proactively resolves client issues and concerns.
- Trains future client service support staff.
- Other duties as assigned.

Qualifications

- Associate's degree in business preferred
- Basic investment and credit knowledge
- Experience in general office work, accounting, and administrative duties
- Strong interpersonal skills
- Strong customer service skills
- Ability to organize and prioritize own work to meet deadlines
- Ability to support a team with routine administrative tasks

Send resume to careers@thetrust.com

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