



Financial Administration Assistant
Rewarding opportunity with a quickly growing servant leadership organization

Are you . . .

- ✓ Fulfilled in serving others?
- ✓ Driven to make a difference?
- ✓ Known for your reliability and integrity?

If so, this position in the estate/wealth services industry is for you.

The Company:

The Trustee Services Group is a local company in the midst of transforming the estate services industry through the delivery of customizable, responsive, beneficiary focused professional fiduciary services. We strive to intentionally deliver an alternative to the relationally distant, institutional trust company model. Our mission is to foster healthy trustee/family relationships by collaboratively serving estate beneficiaries and their professional advisory team.

The Position:

We're looking for a well-respected member of our local community whose proven responsibility and reliability justifies the right to work from home.

We're initially looking for someone to work 10-15 hours per week with seasonal increases to 25 hours per week. The hours are flexible and can be adjusted to meet your schedule.

Compensation is negotiable depending on experience.

Requirements:

- Intermediate to advanced MS office, calendaring, professional correspondence – verbal and written
- Proven clear thinker, well organized, level headed, solution oriented
- Self-starter, efficient, productive, collaborative and works well with a team
- Great interpersonal skills
- Reliably works independently

- Experience in customer service, event planning and/or trust administration a plus
- Detailed list of position responsibilities is attached

The Location:

Although Trustee Services Group has offices in Colorado Springs and Monument, the successful candidate will work primarily from home.

Why should you apply?

- Rewarding career
- Remote working opportunity
- Flexible hours

If this job is for you . . .

- Submit your resume as a PDF attachment.
- Include a cover letter.
- In subject heading of email put "Financial Administration Assistant".
- Email to MarySueP@TrusteeServicesGroup.com

We will contact you by phone or email within two weeks of submission, but only for qualified applicants, which we hope you are!

Financial Administration Assistant Position Responsibilities

The responsibilities, skills and qualities required of the Financial Administration Assistant include:

- Input Trust account bills
- Strong telephone skills
- Strong computer skills (Word & Excel)
- Update Database/Data Entry
- Scanning Documents
- Organizational skills
- Manage account on-boarding touch points
- Maintain accurate and organized online/electronic files
- Follow-up on client requests
- Attend weekly staff meeting
- Process needed Trust paperwork for banking
- Correspondence for Trust Distributions
- Additional Duties as assigned