COVENANT TRUST COMPANY®

8303 West Higgins Road | Chicago, IL 60631 | 800.483.2177 | CovenantTrust.com

PERSONAL TRUST ASSOCIATE (Exempt, Full-Time)

Reports to the Vice President/Administration and Trust Officer

The Personal Trust Associate is an integral part of the administration team at CTC. The position is involved in multiple aspects of the department, including personal trust; IRAs; death administration; tax reporting; transaction requests; and projects.

Major Duties

- Assist with the day-to-day administrative duties to support the administration team account loads.
- Initiate or respond to clients and/or Financial Services Representatives (FSRs) as needed.
- Manage select aspects of death administration for trust and IRAs.
- Handle all requests as assigned by Trust and IRA Administrators.
- Participate in annual trust and IRA tax reporting generation and mailings.
- Communicate remainder beneficiary information to FSRs.
- Prepare various reports for FSRs, Administrators, President and CTC Board.
- Participate in Administration Committee meetings and take minutes.
- Handle special and seasonal tasks of the Administration Department as assigned.

Experience

- Bachelor’s degree or equivalent work experience.
- Trust and/or IRA experience preferred.
- Experience with trust accounting systems. Microsoft Office and Access experience a plus.
- Strong written and verbal communication skills.
- Ability to handle a significant workload and multiple deadlines.
- Ability to organize, prioritize time and tasks, and coordinate with multiple Administrators.
- Ability to work rapidly with attention to detail.
- Ability to function well as part of a team, as well as to work independently.
- Occasional overtime may be required.
- Bilingual a plus.

To Apply

To apply for this position, please send your resume to Ruser Saldaña at rasaldana@covenanttrust.com.

About Covenant Trust Company

Covenant Trust Company is a non-depository trust company chartered in 1988 and regulated by the Illinois Department of Financial and Professional Regulation, Division of Banking. Our shareholders are the Evangelical Covenant Church, Covenant Ministries of Benevolence, and North Park University.

Our mission is to provide effective legacy planning and financial management services to our clients.

We offer employees a comprehensive benefits package that includes: paid time off; life, health, dental, and vision insurance; subsidized gym memberships; and a 401(k) matching plan.

For more information, visit us at www.CovenantTrust.com.