TRUST ASSISTANT RESUME

Objective:

To obtain the position as Trust Assistant to ensure smooth and conflict free functioning of all operations within the organization.

Summary of Skills:

- In depth knowledge of banking, investments and financial planning
- Strong computer skills including proficiency with trust accounting systems
- Admissible telephone manners, excellent communication skills
- Great ability to efficiently collaborate with coworkers and customers
- Operational knowledge of teller and facsimile machine
- Strong oral communication skills including excellent telephone etiquette
- strong interpersonal skills, supervisory and leadership skills
- Ability to demonstrate comfort level in talking to and calling on current and prospective customers

Work Experience:

Trust Assistant, August 2005 to till date
Wisconsin Government, Fort Worth, TX

- Coordinated with Trust Administrators to handle distributions, account maintenance and reviews, and management of overdrafts and other trust related functionaries.
- Gathered and computed client profiles and requests.
- Prepared reports and presentations.
- Monitored work performed by various partner groups to ensure the smooth operation of assigned trust accounts.
- Monitored overdraft reports and communicated with Investors, as necessary.
- Reviewed the trust agreement for applicable language to support discretionary decision.

Trust Assistant, May 2000 to July 2005
JPMorgan Chase, Fort Worth, TX

- Prepared Trust Termination packets for TO review.
- Ensured routine trust and estate bill payments; and arrangement for the replacement of lost and missing checks.
- Deposited incoming receipts into proper accounts in a timely manner.
- Allocated funds if check needs to be allotted in multiple accounts according to percentage of ownership.
- Computed client transactions accurately and ensured daily review of cash request reports, statements and research from operations.

Education:

Associate Degree in Finance, North Iowa Area Community College, Mason City, IA

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