DIVERSIFIED TRUST

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $8 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, !@9JD=KLGF, Greensboro, Memphis and Nashville.

POSITION

-H=J9LAGFK AKKG;A9L=

OFFICE

Nashville Operations

SUMMARY

Diversified Trust is a growing company, looking to add to our -H=J9LAGFK Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT

HR@diversifiedtrust.com

FOR MORE INFO ON DTC

diversifiedtrust.com
Please review our videos.

FLSA STATUS: , - , əEXEMPT

DISCLAIMER:
This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate reflection of those principal job elements essential for making decisions related to job performance, employee development and compensation. As such, the incumbent may perform other duties and responsibilities as required.

Job Summary:

The Client Administrator works with and supports client service teams in providing exceptional wealth management, investment advisory and estate/trust services to firm clients. The Client Administrator serves as the general knowledge base on all operational aspects of client service. In addition, the Client Administrator shares best practices and resolves issues by being actively involved with client service teams.

Primary Duties and Responsibilities

The primary responsibilities of the Client Administrator include, but are not limited to, the following:

- Provide timely, proactive, and exceptional service to all clients; maintain a thorough understanding of client expectations and family dynamics
- Manage and respond to day-to-day inquiries and interactions with clients
- Work with client relationships for account opening (account opening documentation, asset transfers, review of existing assets transfer costs and problem assets, etc.) and account closing (termination of fees, deletion of recurring distributions, coordination with Client Service Specialist, etc.)
- Oversee the disbursement process for client accounts in coordination with Client Service Specialists
- Serve as the client service team liaison with Operations, FIS and Schwab
- Participate in the administrative review process as needed
- Coordinate client tax, estate and personal issues with CPAs, attorneys, insurance agents and other service providers
- Serve as an active part of the estate process for clients; identify required processes to settle the estate if DTC is an executor of the estate
- Manage all retirement plan required minimum distribution payments
- Coordinate and ensure completion of client or firm-specific projects, as necessary (may involve multiple parties and areas of the office, the firm, or third party resources)
- Maintain strict confidentiality of client and company information

Skills and Qualifications:

- Bachelor's degree preferred
- 3 to 5 years of wealth management, trust services or comparable experience preferred
- Ethical practitioner with the ability to exercise sound judgment and effectively manage risk
- Ability to develop trust and build internal and external relationships
- Strong work ethic with the ability to work under pressure and handle multiple tasks within deadlines
- Strong analytical abilities and excellent attention to detail
- Excellent writing and communication skills
- Professional, pleasant and personable in dealing with clients
- Adaptable in a rapidly changing environment
- Proficient in Excel, Word, PowerPoint

If this job seems like a good fit, please email your resume to HR@diversifiedtrust.com