

Client Support Specialist

Harbour Trust is seeking an individual with strong customer service skills to provide direct client services and support the administrative needs of our Wealth Advisors. This is an outstanding opportunity for someone with banking and or administrative experience.

The Duties of the Position include:

A. Provide Direct Client Services

- Greets clients and public entering the building and answer incoming phone calls.
- Build client relationships through friendly, efficient, and accurate service.
- Contact clients to compile documentation as needed for ACH, WIRES, and other distributions.
- Contact vendors or government agencies on behalf of client to clarify or resolve issues.
- Set up distributions and pay bills for clients.
- Mail Run - Bank Deposits for company/client business and other errands for clients in the local geographic area.

B. Administrative Support to Wealth Advisors

- Prepare spreadsheets for clients, proofing documentation, researching, or organizing client information.
- Type correspondence as needed.
- Prepare detailed client meeting packets for monthly, quarterly, or annual account reviews according to each client's packet requirements.
- Complete forms to free receipt and deliver assets.
- Prepare documents for ACH or wiring of funds.
- Assist with estate and trust accounts, not limited to real estate transactions, title search, appraisal and distribution of real and personal property, and coordination of repairs and improvements.

C. Maintain Accurate Account Information

- Data entry and maintenance of account and contact information in GWES.
- Document preparation & recording of mortgages and promissory notes.
- Prepare and record Trusteed Deeds as needed.
- Maintain client files and electronic files and documents in an organized manner.

Candidate Requirements:

- An Associate's degree and/or at least two years' experience in a related field.

The Right Candidate:

- Can prioritize tasks and has a high attention to detail.
- Has unquestionable integrity in handling sensitive and confidential information.
- Has the ability to efficiently gather, compile and analyze large amounts of data, including personal, legal, and confidential information.
- Has the ability to calculate numbers, correct entries, and post to records.
- Must be proficient in MS Office software – Adobe, Word, Excel, GWES.
- Has knowledge of spreadsheet software.
- Has excellent interpersonal skills, the ability to interact effectively with individuals at all levels.

All interested candidates are invited to contact Nora Akins (219) 873-1735.