**Trust Officer**

Harbour Trust is seeking an individual who has a deep understanding of trust administration to provide our clients analytical support related to irrevocable trusts and estate settlements. The position reports to the Senior Vice President and Director of Personal Trust and Marketing.

**The responsibilities of the position are:**

**Manage Trust Account Portfolios:**

- Provide the best possible account administration by building personal relationships with each client and trust beneficiaries.
- Understand each client's financial goals and be able to educate the client.
- Manage the estate settlement processes.
  - Interpret individual trust provisions to settle estates and administer trust accounts.
  - Complete title search, appraisal, and distribution of real and personal property.
  - Communicate with accountants and attorneys.
- Prepare promissory notes, trusteed deeds, mortgage loan documents, and review title commitments as required.

**Direct the Operational Functions of Individual Clients' Portfolios:**

- Interpret and implement legal terms of trust instruments, court orders, and other trust related legal agreements.
- Maintain contemporaneous notes of client interactions.
- Review portfolio asset allocation and transaction history for consistency and legal compliance.
- Draft and present discretionary distribution memos to Trust Administration Review as required.
- Oversee and execute client disbursements for the benefit of beneficiaries or the trust.

**Candidate Requirements:**

- 5 - 10 years of related experience with a related Bachelor's Degree preferred.
- Working knowledge of laws in relation to wills, trusts, and estates. Including Internal Revenue Code and Burns Indiana Statute is required.
- Trust or legal experience is preferred. Paralegal certification is a plus.

**The Right Candidate:**

- Has strong analytical, problem solving, organizational and interpersonal skills, and must possess the ability to work under demanding deadlines.
- Has excellent interpersonal skills and the ability to interact effectively with individuals at all levels.
- Can prioritize tasks and has a high attention to detail.
- Has the ability to efficiently gather, compile, and analyze large amounts of data. Including personal, legal, and confidential information.
- Can read and analyze technical journals, financial, and legal documents. Ability to respond to related inquiries and present information to top management, board of directors, and clients.
- Communicates effectively and collaboratively with coworkers, accountants, and attorneys.
- Has unquestionable integrity in handling sensitive and confidential information.
- Has high proficiency with Microsoft Excel and Word.

All interested applicants please contact Nora Akins (219) 873-1735