

Tax and Operations Specialist Opportunity

Harbour Trust is seeking an individual who has a strong capacity to retain new information, exercise sound reasoning skills, and possesses an intense eye for accuracy. The position reports to the Director of Operations.

The responsibilities of the position are:

Tax Support to the Tax Trust Officer

- Process and submit payments of quarterly federal & state tax estimates as well as tax due payments for personal and fiduciary accounts
- Assist with preparation of fiduciary tax returns on accounts for which HTC acts as trustee
- Annual preparation and filing of IRS 945 forms and associated IN returns
- Production and delivery of forms 1099-R, 1099-B, DIV, INT, 1098, along with account tax worksheets
- Transmit files to the IRS
- Communicate with accountants as needed to advise of account activity
- Perform audits as necessary to ensure proper coding for accurate tax reporting purposes

Operational Support

- Opening accounts
- Closing accounts
- Process OFAC and CIP for new contacts
- Balance suspense accounts monthly
- Set up & update Trust Reporter users & accounts
- Review & approve ACH & wire payments
- Complete BSA FINCEN data base scans
- Provide back up to the Operations Specialists with trade processing, asset reconciliation, transfers, disbursements, deposits and other operational projects.
- Assist with internal audits

Candidate Requirements:

- Bachelor's Degree
- 1-3 years of tax, banking, or other related experience preferred.

The right candidate:

- Has excellent organization skills & the ability to prioritize assignments logically.
- Has ability to problem solve and make decisions in a timely manner.
- Has a high sense of awareness for details and accuracy.
- Has excellent written and verbal communication skills.
- Has high proficiency with Microsoft Excel and Word.
- Works well within a team environment as well as independently with a client servicing mindset.