
Bank Trust Officer Resume

Job Objective

To further improve my skills as a Bank Trust Officer by working for a challenging organization with high goals.

Summary of Qualifications:

- Vast experience in trust administration
 - Sound knowledge of trust, investment management, and wealth transition
 - In-depth knowledge of trust law, income and estate taxes, investments and insurance
 - Proven track record in dealing with complex trust accounts
 - Ability to attract and retain trust and investment customers
 - Proficient with Word, Excel and PowerPoint
 - Strong understanding of related legal, tax and financial concepts
 - Strong interpersonal and communication skills
 - Excellent organizational and analytical skills
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Work Experience:

Bank Trust Officer, August 2005 – Present
JPMorgan Private Bank, Elk Grove, CA

- Coordinated with Tax Department regarding profits, assets and taxes.
- Submitted memoranda to Trust and Investment Committee for approval.
- Conferred with co-trustee to obtain approval.
- Conversed verdict to client and implemented request when necessary.
- Coordinated with portfolio managers regarding asset goals and liquidity requirements.
- Managed accounts related departmental projects.

Bank Trust Officer, May 2000 – July 2005
Bank of Kansas City, Elk Grove, CA

- Provided strategic solutions to clients for constant growth and transition of wealth.
 - Executed on client wealth plans and maintained business records as per established standards.
 - Produced new revenue both as a contributor and individually.
 - Maintained high knowledge of fiduciary, asset, tax and other correlated areas.
 - Designed and delivered sophisticated fiduciary solutions, using team model, to High Net Worth clients with complex financial needs.
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Education:

Bachelor's Degree in Finance, William Paterson University, Wayne, NJ

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