



Title: Senior Trust Officer

Location: Reno, NV

Job Description: **JOB SUMMARY**

The Senior Trust Officer provides trust administration services on behalf of Creative Planning Trust Company, a licensed Nevada trust company.

#### **JOB DUTIES**

- Provide information on the trust company's services to potential trust administration relationships
- Evaluate potential trust administration relationships for suitability with the trust company's services and the trust company's ability to be appointed and serve under the governing agreement
- Assist with the onboarding of new trust administration relationships
- Service existing trust administration relationships, including evaluation of distribution requests and coordination of legal and tax matters
- All other duties as assigned

#### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Bachelor's degree
- Efficient, detail-oriented and accurate

#### **Preferred Experience/ Qualifications:**

- Juris doctorate
- Nevada law license
- 5+ years of trust administration experience

#### **TECHNICAL SKILLS**

##### **Technical Skills**

- Proficient in Microsoft Office

