

Title: Trust Operations Specialist

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The Trust Operations Specialist is responsible for the trust accounting and reporting systems for client accounts of Creative Planning Trust Company.

**JOB DUTIES**

- Develop and implement trust accounting and reporting processes
- Maintain trust accounting system, including account set-up and maintenance, transaction coding, tax recording and reconciliations
- Maintain trust reporting system
- All other duties as assigned

**REQUIRED EXPERIENCE / QUALIFICATIONS**

- Proficient in SunGard's Charlotte Trust Accounting and Investment Management Solution
- Bachelor's degree
- Efficient, detail-oriented and accurate

**PREFERRED EXPERIENCE/QUALIFICATIONS**

- 5+ years of trust operations experience

**TECHNICAL SKILLS**

- Proficient in Microsoft Office