



## TRUST ADMINISTRATIVE ASSISTANT

**Department:** Wealth Management  
**Reports to:** Kurt Kunsch, Senior Vice President / Trust Managing Director  
**Supervises:** NA

**Summary:** The Wealth Management Department at Phoenixville Federal Bank & Trust, a community bank, is looking for an individual that has a strong work ethic, is self-motivated, detail oriented, a team player, and possesses excellent customer service and communications skills. The ideal candidate will possess an understanding of trust operations.

### Job Requirements:

- Superior attention to detail
- Knowledge of basic investing, investment vehicles, IRA's, trust administration, estate administration and income/estate tax matters
- Self-motivated requiring minimal supervision
- Excellent written and oral business communication skills
- Demonstrates problem solving and decision-making skills
- Strong Microsoft Office (Excel, Word, and PowerPoint) skills

### Preferred:

- Bachelor's Degree in business, economics, accounting, finance, or related field with two or more years of related experience or equivalent professional experience with five or more years of related experience.

**Specific Job Functions:**

1. Perform duties of trust administration including client communication, retention, and relationship management.
2. Perform duties of trust operations including daily posting, balancing and asset record management
3. Interface with trust accounting system, workflow processes and trust operations
4. Handle daily account transactions such as wire and cash transfers, ACH disbursements, bill payments, security transactions, purchases, and sales of assets
5. Coordinate account opening documentation processes including transfers of assets and accounts
6. Monitor transactions for completion and accuracy
7. Coordinate investment transactions
8. Calculate unitrust, total return, required minimum distributions, and other payments to beneficiaries
9. Provide backup support for trust officers in client service and communication
10. Coordinate tax related payment information

For consideration, please send resumes to:  
Kurt Kunsch, SVP / Trust Managing Director  
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