



Helping customers with their financial needs and leading the way in innovation and responsiveness is the core of CoreFirst Bank & Trust's ("CoreFirst") mission. This philosophy, the CoreFirst Way, has guided the bank well for over sixty (60) years and sets us apart from competitors.

<b>Position Description:</b>	<b>Trust Assistant</b>				
<b>Reports To:</b>	Trust Officer	<b>Department:</b>	Trust		
<b>Supervises:</b>	None	<b>Classification:</b>	Full-Time, Non-Exempt		
<b>Hours:</b>	8:00 am to 5:00 pm Monday through Friday				
<b>Location:</b>	Headquarters	3035 SW Topeka Blvd., Topeka, KS 66611			
<b>Role:</b>	<p>The Trust Assistant supports the Trust Officer in the management of Trust Department client accounts. In collaboration with the Trust Officer, the Assistant is responsible for providing personal and professional service to the client. The Trust Assistant establishes a relationship with Trust clients with Personal Trust Accounts (Living and Testimony), Agency Accounts (Custody and Investment Management, Estates, and Conservatorships) as well as familiarity with the Bank's policies and procedures. The Assistant contributes to the development and retention of client relationships by providing consistently high-quality customer service.</p>				
<b>Apply:</b>	<a href="http://www.corefirstbank.com/careers">www.corefirstbank.com/careers</a>				
<b>Essential Functions &amp; Responsibilities:</b>	<p>Serves as intermediary between client and Trust Officers on a daily basis by meeting with Officer regarding prior day activities and current items. Interfaces with customers in person and by phone.</p> <ul style="list-style-type: none"> <li>• Coordinates new account set-up:           <ul style="list-style-type: none"> <li>• Prepares new account folders</li> <li>• Establishes tax cost basis of assets transferred to new trust/IM accounts</li> <li>• Oversees new account setup documentation</li> </ul> </li> <li>• Organizes and oversees existing trusts as assigned including:           <ul style="list-style-type: none"> <li>• Reviewing, approving, and responding to mail and bills presented for payment</li> <li>• Collecting, organizing, and tracking all tax information for review by Trust Officer</li> </ul> </li> <li>• Coordinates life needs for current clients:           <ul style="list-style-type: none"> <li>• Maintains payroll records for all caregivers used by Trust clients which includes processing checks, withholding tax information, and working with accounting firm for reporting</li> <li>• Coordinates and oversees the sale and/or shipping of all personal property, appraisals of jewelry/coins/property, and moves to new residence for Trust clients</li> </ul> </li> <li>• Assists Trust Officer upon death of client:           <ul style="list-style-type: none"> <li>• Prepares Date of Death and 6-month Alternate Date of Death Valuations</li> <li>• Assists with any other tasks finalizing the client's estate</li> </ul> </li> </ul>				



<b>Essential Functions &amp; Responsibilities Continued:</b>	<p><b>Administrative Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Maintains orderly, current files and retrieves files/researches information for Trust Officer as needed</li> <li>• Types reports, documents, and other correspondence</li> <li>• Assists customers and answering external and internal calls to the Trust Department</li> </ul> <p><i>Please note this description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.</i></p>
<b>Experience:</b>	<ul style="list-style-type: none"> <li>• Requires Administrative Assistant Experience</li> </ul>
<b>Education:</b>	<ul style="list-style-type: none"> <li>• High school diploma or equivalent required</li> </ul>
<b>Skills &amp; Abilities:</b>	<ul style="list-style-type: none"> <li>• Must be able to apply computing skills to solve problems</li> <li>• Ability to plan, organize, and prioritize work, in order to meet deadlines and maximize efficiency and profitability</li> <li>• Must be attentive to detail and a self-starter</li> <li>• Ability to recognize there is a problem, when something is wrong or likely to go wrong and determining the most effective way to solve the problem</li> <li>• Must have effective verbal and written communication skills including advanced spelling, punctuation, and grammar skills</li> </ul>
<b>Competencies:</b>	Adherence to CoreFirst Values; Respect, Communication, Integrity, Initiative, and Accountability. A secondary focus on internal and external Customers, Compliance, Ethics, Perseverance, and Time Management is also essential.
<b>Computer Skills:</b>	<p>Requires:</p> <ul style="list-style-type: none"> <li>• Intermediate 10-key, data entry, and typing skills</li> <li>• Intermediate ability with Microsoft Word and Excel</li> </ul> <p>Preferred:</p> <ul style="list-style-type: none"> <li>• Microsoft Access, Microsoft PowerPoint, and Adobe</li> <li>• Must be able to select and use appropriate technology to accomplish a given task, and determine how to make the best use of existing hardware and software</li> </ul>
<b>Interpersonal Skills:</b>	A significant level of trust and diplomacy is required, in addition to courtesy and tact. Work involves extensive personal contact with others and may be of a personal or sensitive nature when working through escalations. Must be able to empathize with others and foster sound relationships.
<b>Physical Requirements:</b>	<p>The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.</p> <p>While performing the duties of this job, the employee is regularly required to talk or hear. The employee is frequently required to sit, stand, and walk. Some light physical effort required including ability to lift up to 25 pounds.</p>
<b>Travel:</b>	Travel is negligible. It is primarily local during the business day, although some local evening and weekend travel may be needed.
<b>Work Environment:</b>	This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, copy machines, filing cabinets, and fax machines.

<b>Other:</b>	<ul style="list-style-type: none"> <li>• Applicants must pass a drug screen and background check</li> <li>• Internal applicants must meet the minimum requirements of their current job and submit a resume via the employee portal</li> </ul>
<b>CoreFirst Employment Practices:</b>	<p>CoreFirst provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, CoreFirst Bank &amp; Trust complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.</p>

I, \_\_\_\_\_, acknowledge by my signature below that I have received a copy of my position description.  
 Print Name

I have read and understand my job duties and responsibilities as the **Trust Assistant**. I further understand that I am responsible for the satisfactory execution of all the duties described therein, under any and all conditions as described.

I can perform the essential function of this position with or without reasonable accommodations? \_\_\_\_\_ Yes \_\_\_\_\_ No

I certify that the information provided above is true and complete, and I understand that if the information provided above is false, it may result in denial of employment or dismissal.

Employee Signature

Date

HR Representative Signature

Date

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