

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.

Position Description:	Trust Assistant		
Reports To:	Trust Officer	Department:	Trust
Supervises:	None	Classification:	Full-Time, Non-Exempt
🕒 Hours:	8:00 am to 5:00 pm Monday through Friday		
🏢 Location:	Headquarters	3035 SW Topeka Blvd., Topeka, KS 66611	
📌 Role:	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.		
📄 Apply:	www.corefirstbank.com/careers		
Essential Functions & Responsibilities:	<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">Coordinates new account set-up:<ul style="list-style-type: none">Prepares new account foldersEstablishes tax cost basis of assets transferred to new trust/IM accountsOversees new account setup documentationOrganizes and oversees existing trusts as assigned including:<ul style="list-style-type: none">Reviewing, approving, and responding to mail and bills presented for paymentCollecting, organizing, and tracking all tax information for review by Trust OfficerCoordinates life needs for current clients:<ul style="list-style-type: none">Maintains payroll records for all caregivers used by Trust clients which includes processing checks, withholding tax information, and working with accounting firm for reportingCoordinates and oversees the sale and/or shipping of all personal property, appraisals of jewelry/coins/property, and moves to new residence for Trust clientsAssists Trust Officer upon death of client:<ul style="list-style-type: none">Prepares Date of Death and 6-month Alternate Date of Death ValuationsAssists with any other tasks finalizing the client’s estate		

Essential Functions & Responsibilities Continued:	<p>Administrative Responsibilities</p> <ul style="list-style-type: none"> • Maintains orderly, current files and retrieves files/researches information for Trust Officer as needed • Types reports, documents, and other correspondence • Assists customers and answering external and internal calls to the Trust Department <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>
Experience:	<ul style="list-style-type: none"> • Requires Administrative Assistant Experience
Education:	<ul style="list-style-type: none"> • High school diploma or equivalent required
Skills & Abilities:	<ul style="list-style-type: none"> • Must be able to apply computing skills to solve problems • Ability to plan, organize, and prioritize work, in order to meet deadlines and maximize efficiency and profitability • Must be attentive to detail and a self-starter • 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 • Must have effective verbal and written communication skills including advanced spelling, punctuation, and grammar skills
Competencies:	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.
Computer Skills:	<p>Requires:</p> <ul style="list-style-type: none"> • Intermediate 10-key, data entry, and typing skills • Intermediate ability with Microsoft Word and Excel <p>Preferred:</p> <ul style="list-style-type: none"> • Microsoft Access, Microsoft PowerPoint, and Adobe • 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
Interpersonal Skills:	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.
Physical Requirements:	<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>
Travel:	Travel is negligible. It is primarily local during the business day, although some local evening and weekend travel may be needed.
Work Environment:	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.

