CoreFirst Bank & Trust
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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 sixty (60) years and sets us apart from competitors.

Position Description:	**Trust Operations Associate III – Account & Asset Specialist**		
Reports To:	Trust Operations Manager	Department:	Trust
Supervises:	None	Classification:	Full-time, Non-Exempt

Hours:	▪ Standard 8-hour day: Core hours are from 8:00 am to 3:00 pm, with flexibility to work 8:00 am- 5:00 pm or 7:00 am and 4:00 pm ▪ Additional days, hours, and overtime may be required, especially during periods of high transactional volume
Location:	Headquarters — 3035 SW Topeka Blvd. Topeka, KS 66611
Role:	The Associate serves as the key liaison between the Trust Department and the Trust Operations team and is primarily responsible for new account setup, account maintenance (including account closures), asset transfer(s), registration, valuation/pricing, and maintenance. Participation in ongoing continuing education is required for keeping abreast of industry best practices in Trust Operations. The Associate serves in a "back-up" capacity to other departmental positions.
Apply:	www.corefirstbank.com/careers
Essential Functions & Responsibilities:	• Maintain positive interactions with customers, adhering to established service standards • Handle daily operational duties, including new client account openings and closures • Oversee account authorization, setup, and asset maintenance • Manage data input and maintenance, including system configurations • Maintain records of physical assets and facilitate safe deposit box access, and reconcile accounts • Reconcile accounts, ensuring compliance with regulations • Own and maintain the core Trust Accounting System setup • Facilitate various financial processes, including CD Maturity notifications • Create and maintain departmental templates/forms • Streamline processes for efficiency and profitability, providing input to enhance operations • Produce monthly fee invoices and mail to clients • Oversee asset transfers for new and closing accounts • Update asset prices per statement • Update date of death values *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.*
Experience:	• Familiarity with Microsoft Excel is preferred • Previous trust operations and banking experience or in a similar setting, preferred
Education:	• High school diploma or equivalent required • Bachelor's degree in business or related field preferred
Licensure:	Upon hire, successful completion of various Schools of Trust may be required

Skills & Abilities:	• Ability to read and understand technical system instructions, rules and regulations • Excellent organizational skills, including the ability to prioritize work- • Willingness to establish and maintain effective working relationships through a high level of interpersonal skills • Exceptional communication skills, both written and verbal, that can be demonstrated with internal and external clients • Strong personal drive and initiative, demonstrated work ethic, and ability to work independently and as a team • Ability to manage multiple projects simultaneously and handle a heavy volume of work • Ability to solve practical problems and deal with multiple variables in situations with limited guidance
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. • Detail-oriented with a high level of accountability for accuracy and completion of responsibilities • Intermediate Tier Microsoft Office - Excel skill (pivot tables/charts, nested logical/IF formulas, multiple criteria lookups, arrays) • Career-minded, willing, and with a personal desire to achieve the next level **Preferred Competency** • An in-depth understanding of applicable Trust Company regulations

Physical: Requirements:	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. 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.
Travel:	Travel is primarily local during the business day, although some local evening and weekend travel may be expected.
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.
Other:	• Applicants must pass a drug screen and background checks • Internal applicants must meet the minimum requirements of their current job and submit a resume via the employee portal
CoreFirst Employment Practices:	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 & 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.

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 **Trust Operations Associate III**. 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.

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Employee Signature Date HR Representative Signature Date

Revised 4/2026 KR