

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 Officer		
Reports To:	Director of Trust & Investment Services	Department:	Trust
Supervises:	N/A	Classification:	Full-time, Exempt

 Hours:	8:00 am to 5:00 pm Monday through Friday, other hours as needed	
 Location:	Headquarters	3035 SW Topeka Blvd. Topeka, KS 66611
 Role:	Trust Officers must achieve specific performance objectives relative to personal sales volume and service quality. Trust Officers contribute to the development and retention of customer relationships by providing consistently high-quality customer service, community involvement and relationships with referral sources and centers of influence. Trust Officers contribute to the profitability and growth of CoreFirst Bank & Trust by meeting customer needs through referring consumer and business banking products to new and existing customers according to our mission statement and performance objectives.	
 Apply:	www.corefirstbank.com/careers	
Essential Functions & Responsibilities:	• Administers personal trust, investment agency accounts, and probate accounts • Develops new business by personally calling on customers, prospects, and centers of influence to achieve profitable volume in the following trust functions: • Personal trust accounts (Living and Testamentary) • Agency Accounts (Custodial and Investment Management) • Probate Estates • Conservatorships • Maintains and monitors for maximum profitability consistent with quality service, fee schedules of specific accounts and various types of business • Reviews and recommends acceptance or rejection of various types of trust business • Is active in the community serving on boards, public speaking, and maintaining relations with CPA firms, law firms, and life insurance agencies • Plans and implements seminars, workshops, and other events in order to generate profitable trust business • Attends the following committee meetings: • Trust Investment Committee • Board of Directors, Trust Committee • Trust Staff <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>	
Experience:	Three to five years of trust or related sales or financial services experience required	
Education:	Bachelor's or Master's Degree required; high school diploma or equivalent required. Strong preference for JD, CPA or another industry-specific credential	

Skills & Abilities:	• Strong written, verbal, interpersonal and analytical skills, including ability to interact effectively with customers, employees and management are essential • Strong ability in CoreFirst Bank & Trust Competencies: Customer Focus, Compliance, Ethics, Perseverance, and Time Management • Proficiency in using Microsoft Office, Word, Excel and Outlook • Work must be completed with quality and accuracy • Strong time management skills: Must be able to handle multiple projects and tasks, and follow through in a timely manner • Demonstrate ability to attract and retain trust and investment customers • Ability to write routine reports and business communications • Ability to effectively present information and respond to questions from customers, employees, and management • Understanding of basic investment and financial concepts • Maintain a general knowledge of trust law, income and estate taxes in investments and insurance products
Competencies:	Adherence to CoreFirst Values: Respect, Communication, Integrity, Initiative, and Accountability.
Interpersonal Skills:	A significant level of personal trust is required as this position is exposed to sensitive and confidential information which cannot be shared outside of the Department. Diplomacy, courtesy, and tact is required. Demonstrated ability to foster sound professional relationships with customers and management is necessary.

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 and listen to customers and other employees. Physical activities include a combination of constant sitting, constant hand motion, and occasional standing/walking. These activities are not necessarily performed to the same degree and combination every day.
Travel:	Travel is negligible, 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, advise their manager/ supervisor that they are applying, 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 Officer**. 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

Revised April 2026 KR