

## Trust Operations and Compliance Manager

Location: Candidates located in or willing to relocate\* to the State of Michigan will be considered. Preferred locations are Farmington Hills or Midland, MI.

The Trust Operations and Compliance Manager is responsible for the management of all aspects of Trust Operations and management of operations vendors. Responsibilities include day-to-day review and random audit of trust account synoptic changes and disbursements from the trust accounts, managing the TSS/FIS AddVantage Trust Accounting System, creation of special reports, verifying the accuracy of fees charged, along with training of the Trust Operations Associates. This position is responsible for retaining all monthly, quarterly, and annual reports from the Trust Accounting system. The Trust Operations and Compliance Manager is also in charge of the annual Compliance training for the entire team. This position is responsible for the signed quarterly transaction report, referral payout calculations and a number of other compliance and operational reports and functions.

The chosen candidate will participate in relevant committees and work with President/CEO to prepare board and other committee materials.

### Qualifications, Knowledge and Skills

- Requires extensive trust operations education and CTFA/CSOP certifications.
- 10 years of trust operations experience required.
- 10 years of Personal Trust experience preferred.
- 10 years of industry experience preferred.
- Must be proficient in Microsoft Office Suite.
- Must have ability to create and upkeep charts, graphs, and other reports.
- Must possess attention to detail.
- Must be able to multitask in a fast-paced environment.
- Must be able to navigate on the FIS AddVantage trust system.
- Must have outstanding verbal and written communication skills.

### Physical Requirements

- Work involves eye strain from frequent use of computer screens and reading.
- Work requires the ability to concentrate on the matter at hand and multi-tasking, working with team members at multiple sites across large geographic footprint.

### About Credit Union Trust

Credit Union Trust is a limited purpose bank organized to provide trust products and services to credit union members and the public. Credit Union Trust is solely owned by Michigan credit unions. Credit Union Trust's products and services are designed to create, protect, and preserve wealth for individuals and their families.

**\*No relocation assistance is provided.**

**This Position Description is not a complete statement of all the duties and responsibilities comprising the position.**

**Nothing in this Position Description restricts management's right to assign and reassign duties and responsibilities to this position at any time.**