

Lead Client Service Associate

Candidates located in or willing to relocate to the State of Michigan will be considered. Preferred location is Farmington Hills, MI.

The Lead Client Service Associate is responsible for enhancing the experience of the current and prospective clients of Credit Union Trust. Responsibilities include responding to client inquiries and service requests, proactively managing client contact schedules, coordinating the various work flows of the trust officers, portfolio managers and other team members who support the client experience, preparing written communications to clients, preparing necessary client documentation for internal compliance and other purposes, maintaining physical and digital files, use of the TSS/FIS AddVantage Trust Accounting System and other systems, creation of special reports, completing account opening, closing and other tasks—including the initiation and tracking of disbursements and receipts, and all other tasks as assigned.

Qualifications, Knowledge, and Skills

- Bachelor's Degree
- 5+ years of Personal Trust experience preferred.
- 5+ 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, to multi-task, and to work with team members at multiple sites across a 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.

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.



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