

Job Title: Trust Associate	Last Revision: 11/20
Percentage of Time Allocated: 100%	
Department: Trust	
Reports: VP Trust	
Supervises: None	
FLSA Status: Non-Exempt	
Summary: Works with Trust Officers to manage accounts for which the financial institution acts as a personal representative, trustee, guardian of assets of minors or incompetents, or agent under an investment management arrangement.	
Job Requirements: <ul style="list-style-type: none"> • High school diploma or equivalent • Bachelor degree preferred but not required • Banking experience preferred but not required • Trust experience preferred but not required • Basic accounting knowledge • Basic understanding of legal documents • Exceptional customer service skills • Basic computer skills • Good organizational and time management skills • Ability to multi-task • Basic math and problem solving skills • Strong communication skills • Team player 	
Specific Job Functions: <ol style="list-style-type: none"> 1. <u>Strategic Objectives</u> <ol style="list-style-type: none"> a. Reviews, executes and practices objectives within SFSB's Strategic Plan. b. Realize and support strategic goals. 2. <u>Compliance</u> <ol style="list-style-type: none"> a. Responsible for knowing and complying with all Bank policies and procedures that apply to the Trust Department. b. Responsible for knowing and complying with all Federal Regulations that apply to the Trust Department, including, but not limited to BSA/AML/OFAC and CIP. 3. <u>Trust Administrator Duties</u> <ol style="list-style-type: none"> a. Works with Trust Officers for the establishment of trust department accounts. b. Develops new and additional business among existing trust customers. c. Ensures that trust department accounts are administered in accordance with legal documents. d. Keeps abreast of trends and regulations in the trust business by regular continuing education. e. Backs-up the Trust Operations Manager. 4. <u>Communication</u> <ol style="list-style-type: none"> a. Communicates with team regularly 5. <u>Additional Responsibilities</u> <ol style="list-style-type: none"> a. Performs other duties as directed by supervisor. <p>The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. While performing the duties of this</p>	

job, the employee is required to use hands to handle or feel objects, tools or controls. The employee frequently is required to sit, reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk, climb or balance; and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. The noise level in the work environment is usually moderate to quiet.

Employee Signature

Date

Supervisor Signature

Date