



NOAH WILLIAMS

Trust Assistant

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🌐 www.qwikresume.com

PROFESSIONAL SUMMARY

Accomplished Trust Assistant with 10 years of extensive experience in trust account administration and compliance management. Proven expertise in facilitating seamless communication with clients, ensuring adherence to trust agreements, and maintaining meticulous financial records. Passionate about driving operational excellence and enhancing client satisfaction within a collaborative team environment.

WORK EXPERIENCE

Trust Assistant

📅 Mar / 2018-Ongoing

Blue Sky Innovations

📍 Chicago, IL

1. Completed new account setups within service level agreements, identifying and addressing out-of-standard accounts.
2. Conducted thorough due diligence, verifying fund sources to ensure compliance.
3. Ensured account types adhered to trust documents and applicable regulations.
4. Reviewed accuracy in accordance with state laws and industry standards.
5. Assisted in the onboarding process for new trust clients and accounts.
6. Conducted internal audits of new accounts, ensuring data integrity in the IRS database.
7. Mentored and trained new associates, fostering a culture of compliance and accuracy.

Trust Assistant

📅 Mar / 2015-Mar / 2018

Cactus Creek Solutions

📍 Phoenix, AZ

1. Managed all aspects of trust account documentation and processing systems.
2. Maintained organized and accurate trust account files, ensuring easy access for audits.
3. Processed annuity and distribution payments promptly and accurately.
4. Provided exceptional customer service to the Wealth Management group, including Senior Trust Administrators and Trustees.
5. Collaborated with team members to enhance overall operational efficiency.
6. Utilized organizational skills to streamline accounting-related tasks.

EDUCATION

Bachelor of Science in Finance

📅 Mar / 2012-Mar / 2015

State University

📍 Santa Monica, CA

Focused on financial management and investment strategies relevant to trust administration.

SKILLS

Estate Planning



Due Diligence



Investment Analysis



Portfolio Management



Regulatory Compliance



Client Retention Strategies



INTERESTS

★ Surfing

🥋 Martial Arts

👥 Community Service

📝 Blogging

STRENGTHS

⌚ Patience

🏔️ Perseverance

📅 Planning

⚙️ Positivity

LANGUAGES



English



Japanese



Polish

ACHIEVEMENTS

★ Streamlined the new account setup process, reducing build time by 20%.

★ Achieved 100% compliance in internal audits for trust accounts over two consecutive years.