EMMA JOHNSON

Trust Associate Consultant

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PROFESSIONAL SUMMARY

Accomplished Trust Associate Consultant with 5 years of experience in managing fiduciary accounts and ensuring compliance with regulatory standards. Expert in executing complex transactions and enhancing client relationships. Driven to deliver outstanding service and strategic financial solutions that foster client satisfaction and long-term partnerships.

WORK EXPERIENCE

Trust Associate Consultant

Mar / 2022-Ongoing

Pineapple Enterprises

Santa Monica, CA

1. Ensured accurate crediting of dividends and interest payments to client accounts, enhancing trust and reliability.
2. Conducted monthly custody asset reconciliations, reporting discrepancies to management for prompt resolution.
3. Completed AIB certification in Trust Operations, furthering expertise in fiduciary and financial management.
4. Maintained high confidentiality standards, effectively managing sensitive account documentation and relationships.
5. Organized team activities that fostered a collaborative environment within the trust department.
6. Performed thorough account reviews to ensure compliance with internal policies and regulatory requirements.
7. Executed daily security transactions for relationship managers, optimizing portfolio management.

Trust Associate

Mar / 2020-Mar / 2022

Cactus Creek Solutions

Phoenix, AZ

1. Collaborated with sales, marketing, and administrative teams to streamline accounts receivable processes, enhancing operational efficiency.
2. Supported various IT projects, contributing to creative solutions in trust account management.
3. Managed and transferred incoming trust accounts, ensuring compliance with bank protocols.
4. Administered multiple trust types, coordinating with tax and compliance teams to meet client needs.
5. Processed client requests for municipal bond accounts, ensuring accurate execution of trades and payments.
6. Oversaw investment portfolios, aligning with stated policy parameters to maximize client returns.

EDUCATION

Bachelor of Science in Finance

Mar / 2018-Mar / 2020

University of California, Berkeley

Portland, OR

Focused on financial management and investment strategies, providing a strong foundation for a career in trust and fiduciary services.

SKILLS

- Estate Planning
- Investment Management
- Ethical Judgment
- Project Management

ACHIEVEMENTS

- Streamlined account review processes, reducing turnaround time by 20%.
- Managed over 100 fiduciary accounts, ensuring timely transactions and compliance with regulations.
- Developed comprehensive investment performance presentations that enhanced client understanding and satisfaction.