ROBERT SMITH

Trust Officer

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Trust Officer with 2 years of experience in Performing annual oversight of trust tax reporting. Responsible for Developing and maintaining a thorough understanding of client needs make cross-referrals to appropriate resources.

CORE COMPETENCIES

Ms Office Suite, Six Sigma, Real Estates, Communication Skills.

PROFESSIONAL EXPERIENCE

Trust Officer

ABC Corporation - May 2002 – July 2003

Key Deliverables:

- Responsible for interpreting wills and closing out various types of trusts in New Mexico and Texas.
- Developed business relationships with clients and assures client satisfaction.
- Oversaw client profitability, cross-sell marketing plans, risk management, legal, and compliance issues.
- Pursued and developed new relationships with clients.
- Required a bachelors degree in the area of specialty and 4-6 years of experience in the field or in a related area.
- Familiared with a variety of the fields concepts, practices, and procedures.
- Relied on extensive experience and judgment to plan and accomplish goals.

Trust Officer

Delta Corporation - 2001 – 2002

Key Deliverables:

- Investment and Relationship Management for Trust Clients Income for the Department was over $200,000 Tax and Regulatory Compliance Responsibilities.
- Same duties as Associate Corporate Trust Administrator with the addition of the following Signing privileges as a representative officer on bonds.
- Trained within Brokerage trading desk and as a broker trainee.
- Community Service Activities Magee Chamber of Commerce Board of Directors Research and Development Team Grace City Church, Jackson, MS.
- First Baptist Church Jackson College Ministry Team.
- Master of Business Administration in Finance, Wayne State University, Detroit, Michigan Bachelor of Science in Business Administration, Central Michigan University Six Sigma Green Belt Certification, Lear Corporation Dan has shown immense leadership skills in leading both financial and operational audits within the corporation.
- May lead and direct the work of others.

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EDUCATION

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