



BEST PLACE TO WORK 2017-2023

CLIENT SERVICES AND TRUST ADMINISTRATION COORDINATOR

This position will provide administrative and operational support to Lee Bank trust department and October Mountain Financial Advisors. Lee Bank's trust department serves as a fiduciary for a number of single and multi-generational families locally and throughout New England. October Mountain Financial Advisors is a wealth management firm which manages assets and provides financial planning for individual and institutional clients throughout the Berkshires and nationally. This individual will perform confidential private banking transactions and will support the clients of both firms. This role will serve as a dual employee of Lee Bank and October Mountain Financial Advisors.

The optimal candidate will have the following credentials, qualifications, education and work experience:

- Education and Experience: High School Diploma, 2+ years of Wealth Management experience and/or 3 - 5 years of banking environment experience.
- Basic understanding of investment products and strategies.
- Complete and pass a Fundamentals of Trust Services course.
- Ability to perform job functions accurately and with attention to detail
- Ability to work independently and in a team environment
- Ability to manage and prioritize numerous projects simultaneously in a time sensitive environment.
- Excellent organizational skills
- Customer service excellence
- Strong oral communications with clear and concise writing skills
- Strong Computer skills, proficient in Microsoft Office, Salesforce, DocuSign, and Zoom

application link



Lee Bank offers a competitive compensation package. Please refer to Lee Bank's career section at www.leebank.com for a complete listing of benefits offered.

**PLEASE RESPOND BY
SENDING RESUME TO:**

Email: Susan Brown, SVP at sbrown@leebank.com
Mail: HR Department - Lee Bank 75 Park St. Lee, MA 01238

Employment Application can be found at Lee Bank.com → About Us → Careers

LEE BANK IS AN EQUAL OPPORTUNITY EMPLOYER AND STRONG ADVOCATE OF WORKFORCE DIVERSITY
RACE/COLOR/GENDER IDENTITY/RELIGION/NATIONAL ORIGIN/DISABILITY/VETERAN