Sr. Account Mgr., Estate Administration

Apply

NORTHERN TRUST

Hybrid

Miami, FL

Full time

Posted 14 Days Ago

R124967

About Northern Trust:

Northern Trust, a Fortune 500 company, is a globally recognized, award-winning financial institution that has been in continuous operation since 1889.

Northern Trust is proud to provide innovative financial services and guidance to the world's most successful individuals, families, and institutions by remaining true to our enduring principles of service, expertise, and integrity. With more than 130 years of financial experience and over 22,000 partners, we serve the world's most sophisticated clients using leading technology and exceptional service.

We have a balanced hybrid working model to ensure you get the flexibility you need, and the successful candidate will spend their time between working in the office and working from home.

The Sr. Account Manager will be responsible for maintaining client relationships by coordinating administration of complex fiduciary, investment management, estate settlement, guardianship, and/or custody accounts. This Partner establishes and maintains the account, responds to client inquiries, produces action plans and reports, and oversees transaction processing in coordination with the Client Support Services Team. The partner assists Wealth Management Trust Advisors, Estate Settlement Administrators, Guardianship Administrators and/or Client Advisors with client requests, meetings, business development and creating client presentations.

Key Responsibilities include:

1. Coordinates account administration for fiduciary, investment management, estate settlement, guardianship, and/or custody accounts for complex client relationships.

2. Develops and maintains working knowledge of governing documents and account agreements.

3. Receives service requests from clients and partners and communicates to service partners; obtains appropriate information from partners and clients to facilitate service changes or transactions.

4. Coordinates resolution of client issues; informs client of steps taken to resolve requests or problems.

5. Oversees development of appropriate action plans for client servicing events and ensures execution and follow-up; communicates with clients regularly to inform them of account set-up or status, document requests, or other information.

6. Engages the Client Support Services Team on execution of client servicing events, account opening and closing, cash movement, and fee set-ups.

7. Assists Trust Advisors, Estate Settlement Administrators, Guardianship Administrators, and/or Client Advisors in account acceptance process, discretionary request analysis and process, compliance management and annual account review process; ensures appropriate documentation is collected and imaged; ensures systems information is up-to-date; ensures accurate set up and review of fees; documents services provided, specialized procedures, and ongoing written communications with client as appropriate in managing daily activity.

8. Develops and maintains a working knowledge of various business applications critical to relationship management including client on-line tools.

9. Assists Trust Advisors, Estate Settlement Administrators, Guardianship Administrators, and/or Client Advisors with business development and client presentations. Identifies service efficiency enhancements, process improvements, and service delivery using creative and proactive measures.

10. Able to serve as a key subject-matter expert and mentor to other more junior-level employees.

11. May manage daily operational activities and supervise day-to-day work of junior-level employees (but not a formal management role).

12. More technically sound in area of expertise and has broader knowledge of other areas.

13. Delivers a work product that requires less revision.

14. Able to facilitate discussions and reach decisions.

The successful candidate will benefit from having:

- **Excellent oral and written communication skills are required.**
- **In-depth Functional / Industry Knowledge of personal trust, estate, guardian and Advisory services and products, usually acquired through related work experience, is required.**
- **Knowledge of internal bank trust functions is required.**
- **Analytical, problem solving, and organizational skills are required.**
- **Highly flexible and adaptable to change.**
- **Technical skills / systems knowledge (e.g. Peoplesoft) is required.**
- **A College or University degree and/or relevant proven work experience is preferred.**
- **3-5 years' experience in financial servicing or related experience/credentials preferred.**

Working with Us:
As a Northern Trust partner, greater achievements await. You will be part of a flexible and collaborative work culture in an organization where financial strength and stability is an asset that emboldens us to explore new ideas.

Movement within the organization is encouraged, senior leaders are accessible, and you can take pride in working for a company committed to assisting the communities we serve! Join a workplace with a greater purpose.

We'd love to learn more about how your interests and experience could be a fit with one of the world's most admired and sustainable companies! Build your career with us and apply today. #MadeForGreater

Reasonable accommodation

Northern Trust is committed to working with and providing reasonable accommodations to individuals with disabilities. If you need a reasonable accommodation for any part of the employment process, please email our HR Service Center at MyHRHelp@ntrs.com.

We hope you're excited about the role and the opportunity to work with us. We value an inclusive workplace and understand flexibility means different things to different people.

Apply today and talk to us about your flexible working requirements and together we can achieve greater.