LEGACY
PRIVATE TRUST COMPANY

Client Representative

Location: Oconomowoc, Wisconsin

Why Join Legacy Private Trust Company?

At Legacy Private Trust Company, we are committed to excellence in wealth management and financial services, empowering individuals, families, and organizations to build meaningful and lasting legacies. As a trusted fiduciary, we hold ourselves to the highest standards of integrity, collaboration, and innovation. This commitment creates an environment where our team members and clients thrive together.

We view every role within our organization as integral to our collective success. With this in mind, we are highly selective in our hiring process, ensuring that each team member brings exceptional expertise and aligns with our core values. At Legacy, we prioritize cultural fit, as shared principles and purpose drive our ability to achieve outstanding results.

Joining Legacy means becoming part of a professional and supportive environment dedicated to growth, respect, and open communication. We foster a workplace where each individual's voice is valued, contributions are recognized, and continuous learning is encouraged. We believe that investing in our employees is essential to delivering the exceptional service our clients deserve.

At Legacy Private Trust Company, our people are our most valuable asset. If you aspire to be part of a forward-thinking team that values excellence, integrity, and collaboration, we invite you to explore a career with us. Together, we can shape a future that inspires and endures.

To Apply: Email Resume to Careers@LPTrust.com

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Our Company Job Description

LOCATION	DEPARTMENT	Salary Grade 2	STATUS
Oconomowoc, WI	Administration	$42,500 - $60,000	Non-Exempt

Job Description

JOB SUMMARY

The **Client Representative** delivers exceptional client service within Legacy Private Trust Company, supporting both Legacy's clients and assigned Administrative Officer(s) with a variety of complex administrative tasks. This role is responsible for ensuring the accurate, efficient, and timely processing of client-related activities, including account management, client communications, meeting coordination, and monitoring of account activities. Through effective planning, scheduling, and communication, the Client Representative upholds the highest standards of professionalism, maintaining clear, supportive interactions with clients and colleagues while staying current on industry practices.

DUTIES AND RESPONSIBILITIES

- Maintain confidentiality in all aspects of client and staff information.
- Adhere and uphold the conduct and performance standards of Legacy in all duties performed.
- Assist assigned officer(s) in all aspects of day-to-day activities:
- Prioritize workload to meet clients and the Administrative Officer's requirements, expectations, and requests.
- Monitor accounts for overdrafts, daily transactional activity, bill paying, etc.
- Coordinate correspondence, both incoming and outgoing, including the mailing of client statements and tax information.
- Assist with the opening and closing of accounts, including the gathering of necessary information, including but not limited to agreements, account acceptance forms, reviews, and any other forms necessary to complete the documentation.
- Answer, screen, and timely return telephone calls, emails, and other correspondence. Respond to client, prospect, and center of influence (COI) inquiries and requests and, if necessary, refer the caller to the appropriate individual who can timely handle or process the inquiry/request.
- Assist in the compilation of data and preparation of a variety of internal reports, records, and forms.
- Schedule and confirm appointments for assigned officer(s).
- Assist with processing and verifying discretionary requests and other distributions and receipts as requested by the client.
- Make travel arrangements when necessary.

- Maintain a standard electronic client filing system (DocuWare) to ensure organization and the swift retrieval of information by other Legacy employees.
- Monitor and complete initial and annual administrative account reviews on a timely basis.
- Maintain effective communication with the assigned officer(s) and other internal departments with respect to workload, anticipated absences, and other factors affecting workflow.
- Provide backup to other Client Representatives when necessary due to absences or high work volumes.
- Take part in training:
    - Internal training related to procedural changes, new forms, etc.
    - Software programs: MS Office programs, DocuWare, FIS Trust Accounting System, CapitalBase
    - ABA annual training (Requirement)
    - Lunch & Learn opportunities on industry-related topics (i.e., current tax issues, trust law, fiduciary litigation, advantages of LLC, community property vs. common law)
    - External training opportunities related to industry-related topics.
- Performs other related duties as assigned or requested.

Job descriptions may be subject to change as needed

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

MINIMUM EDUCATION

High School Diploma

PREFERRED EDUCATION

Bachelor's Degree

MINIMUM EXPERIENCE

2 - 3 years of Customer Service experience

PREFERRED EXPERIENCE

1-3 years

CERTIFICATIONS/LICENSES

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit; use hands and arms, and talk or hear.

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions. The noise level in the work environment is usually moderate.

LANGUAGE ABILITY

Ability to read and interpret documents such as trusts, wills, deeds, and other legal documents, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence and proofread for accuracy. Ability to speak effectively before groups of customers or employees of the organization.

MATH ABILITY

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

COMPUTER SKILLS

To perform this job successfully, an individual should have knowledge of Windows Microsoft Office programs and the World Wide Web.

KNOWLEDGE, SKILLS AND OTHER ABILITIES

- Knowledge of principles and practices of organization, planning, records management, and general administration.
- General knowledge of various types of investment accounts (i.e., agency, trust, estate, retirement).
- General knowledge of trust industry terms (i.e., fiduciary, beneficiary, residual beneficiary).
- General knowledge of tax (i.e., gains, losses, income vs. principal).
- Ability and willingness to provide superior, personalized client service.
- Ability and willingness to project a professional image in all interactions with external and internal clients.
- Ability and willingness to prioritize, multi-task, and keep other team members on task.
- Ability and willingness to follow oral and written instructions.
- Ability and willingness to maintain confidentiality.

- Ability and willingness to work well either alone or as part of a team.
- Ability to take initiative.
- Ability to develop strong working relationships with 3rd parties.