



## Senior Corporate Coordinator

**Location:** Corporate Office | Neenah, WI

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### 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.

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**To Apply:** Email Resume to [Careers@LPTrust.com](mailto:Careers@LPTrust.com)



## Senior Corporate Coordinator

### Our Company Job Description

**REVISION DATE**  
October 24, 2024

**DEPARTMENT**  
Corporate Services

**REPORTS TO**

**STATUS**  
Exempt

#### Job Description

##### **JOB SUMMARY**

The Senior Corporate Coordinator is a critical, high-impact role and is responsible for providing comprehensive administrative support to the President and Executive Vice President. As a trusted partner to senior leadership, this position demands exceptional organizational acumen, unwavering attention to detail, and the highest level of discretion. The Senior Corporate Coordinator will oversee essential tasks across multiple corporate functions, including finance, human resources, marketing, shareholder services, and third-party vendor management, ensuring the seamless operation of the organization. This role requires managing sensitive, complex responsibilities, supporting high-value client relationships, and preparing detailed reports for board, executive, and internal meetings. Proficiency in advanced technology solutions, including Artificial Intelligence (AI) tools, is essential to optimizing efficiency and driving productivity. The Senior Corporate Coordinator will coordinate events, support executive initiatives, and provide reliable backup across key corporate functions. Experience working with high-net-worth individuals and the ability to manage and prioritize multiple high-level projects simultaneously is critical for success in this role.

##### **DUTIES AND RESPONSIBILITIES**

- Provide proactive administrative support to the President and Executive Vice President, including managing dynamic calendars and organizing executive-level meetings.
- Act as the primary liaison between executives and high-value clients, ensuring seamless communication, timely follow-ups, and fostering strong, trusted relationships.
- Prepare, proofread, and finalize comprehensive reports and presentations for board meetings, executive sessions, and other key engagements, ensuring accuracy and professionalism.
- Oversee and manage shareholder services, including handling confidential correspondence, coordinating documentation, and organizing shareholder meetings in compliance with regulatory standards.
- Act as a financial backup, assisting with financial reporting processes in QuickBooks, ensuring accuracy and timeliness in financial data management.
- Support human resources functions, including assisting with executive onboarding processes, maintaining sensitive employee records, and contributing to HR-related initiatives.
- Leverage Artificial Intelligence (AI) tools to enhance operational efficiency, automate routine tasks, and optimize workflows across multiple corporate functions.

- Plan, coordinate, and execute high-profile internal and external events, ensuring all details align with company standards and strategic objectives.
- Maintain the highest level of confidentiality in all communications and interactions, both internally and externally.
- Assist with client onboarding, document preparation, and account management tasks, collaborating with the Trust Officer and internal teams to ensure a seamless client experience.
- Compile, analyze, and prepare detailed reports, presentations, and other materials for internal and external stakeholders, ensuring clarity, accuracy, and alignment with strategic goals.
- Manage third-party vendor relationships, ensuring contractual obligations are met and maintaining quality service levels across external partnerships.
- Provide reliable backup across key corporate functions, including finance, human resources, marketing, and shareholder services, ensuring continuity of operations at all times.
- Proactively identify and implement process improvements to optimize executive operations and support company-wide initiatives.

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.

### **PREFERRED EDUCATION**

Bachelor's degree in Business Administration, Finance, Human Resources, or a related field. An advanced degree or certification in executive support, office management, or project management is highly desirable.

### **MINIMUM EXPERIENCE**

3-5 years of experience providing administrative support to senior executives or C-suite leaders, ideally within a financial services, legal, or high-net-worth environment.

### **PREFERRED EXPERIENCE**

5+ years of experience supporting senior executives or C-suite leaders in a fast-paced, high-stakes environment. Extensive experience handling complex tasks, sensitive information, and providing executive-level service in financial or high-net-worth sectors.

### **CERTIFICATIONS/LICENSES**

Certified Senior Administrative Coordinator (CEA), Professional Administrative Certification of Excellence (PACE), or similar certifications are preferred but not required.

### **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. The role includes tasks that require both close and distance vision. Driving is often expected as part of the position.

## **WORKING ENVIRONMENT**

The work environment characteristics described here are representative of what an employee may encounter while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform these functions.

This position operates primarily in a professional office environment, where the noise level is typically quiet to moderate. Occasional off-site visits or events may require adaptability to different environments. The role may also involve interactions with high-level executives and clients, requiring a professional demeanor at all times.

## **LANGUAGE ABILITY**

Strong ability to read, analyze, and interpret complex documents such as trusts, wills, deeds, legal contracts, operating manuals, and procedural guidelines. Demonstrated skill in drafting clear, accurate reports and correspondence, with a keen eye for detail in proofreading. Excellent verbal communication skills, with the capacity to present information effectively to groups of clients, executives, or employees, ensuring clarity and professionalism in all interactions.

## **MATH ABILITY**

Highly proficient in performing advanced calculations, including addition, subtraction, multiplication, and division across all units of measure, with strong expertise in handling whole numbers, fractions, and decimals. Demonstrated ability to compute rates, ratios, and percentages with accuracy and to effectively interpret and create bar graphs and other data visualizations with clarity and precision.

## **REASONING ABILITY**

Strong ability to apply sound judgment and common sense to follow instructions provided in written, oral, or diagram form. Skilled in analyzing and resolving problems that involve multiple concrete variables, even in standardized or structured situations, with a focus on efficiency and accuracy.

## **COMPUTER SKILLS**

Highly proficient in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and document management systems like DocuWare. Experienced with financial software such as QuickBooks and familiar with Artificial Intelligence (AI) applications to enhance office productivity and streamline workflows. Demonstrated ability to quickly learn and adapt to other software platforms, including CRM systems, Trust Accounting software, and other specialized tools essential for executive operations.

## **KNOWLEDGE, SKILLS AND OTHER ABILITIES**

- Knowledge of principles and practices of executive-level organization, planning, records management, and general administration.
- Strong understanding of various types of investment accounts (i.e., agency, trust, estate, retirement) and trust industry terminology (i.e., fiduciary, beneficiary, residual beneficiary).
- General knowledge of tax principles related to gains, losses, income vs. principal.
- Exceptional ability and willingness to provide superior, personalized client service, particularly in high-net-worth environments.
- Ability and willingness to project a professional image in all interactions with both internal and external clients, maintaining the highest level of discretion and confidentiality.

- Proven ability to prioritize, multi-task, and manage several high-level projects simultaneously, while keeping other team members on task.
- Proven ability to follow oral and written instructions with precision and thoroughness.
- Strong initiative and problem-solving skills, with a proactive approach to addressing challenges and streamlining workflows.
- Demonstrated ability to work effectively both independently and as part of a team, with the flexibility to adapt to shifting priorities.
- Ability to develop and maintain strong working relationships with third-party vendors and other external partners.
- Meticulous attention to detail, with a commitment to accuracy in reporting, correspondence, and financial documentation.