

Operations Assistant - Trust & Wealth Management

Department: Trust & Wealth Management

Location: Lebanon, OH

Essential Duties and Responsibilities:

- Open client accounts and request and reconcile incoming asset transfers
- Process ongoing account transactions by check, wire, and ACH
- Balance and reconcile department accounts
- Settle securities trades, post dividends and interest, and post account transactions for outside advised accounts
- Support tax function by tracking, generating, mailing and electronically filing tax forms and returns

Qualifications:

- Proficient in Excel and capable of learning new software programs and databases
- Organized and able to manage multiple tasks with various deadlines
- Able to work independently and as part of a team
- Self-starter who anticipates and resolves issues and generates ideas to improve efficiency of Dept.
- Willingness to learn new tasks and develop professionally

Education/Experience:

- 3 or more years of experience in financial services preferred
- Associate's Degree preferred, but not required

Application Process:

- Please email your resume to Kelly Schwabacher, SVP & Head of Trust Administration, at kschwabacher@lcnb.com.