Client Care Coordinator

Department: Wealth

Location: Lebanon, OH

Summary:

The Client Care Coordinator is responsible for welcoming and engaging all visitors and clients of the Wealth department of LCNB. The incumbent will work closely with all members of the Wealth team to ensure existing and potential clients have a positive experience overall.

Essential Duties and Responsibilities:

- Answer phone calls for Department and greet clients
- Scan and file documents
- Daily mail duties
- Assemble prospect materials for Trust Officers and Portfolio Managers
- Prepare conference room for client meetings
- Order and coordinate Department supplies
- Print and mail statements and other written materials
- Schedule, generate, and mail tax checks
- Track payment of taxes and estimated taxes, receipts of refunds, mailing of client tax information and returns.
- Provide operational and administrative support to the Tax Officer
- Process Account Payable requests
- Other duties, as assigned

Required Traits & Skills:

- Professional yet genuine demeanor
- Ability to relate to and engage with clients of diverse backgrounds and experiences
- Outgoing; enjoys interacting with people
- Strong verbal and written communication skills
- Proactive problem-solving skills
- Ability to prioritize multiple tasks and assignments
- Solid computer skills/comfortable with technology, including Excel
- Organized
- Dependable
- Flexible

Education/Experience:

- 2 years of experience in an administrative support role, including answering phones, directing calls, and greeting clients
- Minimum Associates degree preferred

Physical Requirements:

- Must be able to remain in a stationary position up to 75% of the time
- Must be able to move about as required to access file cabinets, office machinery, etc.