



Position Description  
*Trust Officer*

Department: Wealth Management

Location: Lebanon, OH

Essential Duties and Responsibilities:

- Build meaningful relationships with clients by understanding their priorities and values, and educating them about estate planning strategies
- Provide expert administration of assigned accounts including personal trusts, estates, managed agency accounts, and IRAs
- Research and resolve complex estate planning issues, as needed
- Collaborate with internal partners to maintain current knowledge of LCNB products and capabilities and to identify opportunities to broaden client relationships
- Join professional organizations and attend associated networking and continuing education opportunities
- Maintain awareness of and adherence to compliance requirements and risk management concepts, expectations, and policies and procedures
- Become involved in the local community and surrounding areas

Qualifications:

- Ability to work as an individual and as part of a team
- Experience in a client facing role
- Self-motivated and adapts well to change
- Ability to coordinate and organize multiple tasks
- Strong written communication and interpersonal skills
- Basic to intermediate proficiency in Microsoft Office

Education/Experience:

- 5 or more years of experience in Trust or Wealth Management required
- Bachelor's degree required
- Advanced degree or certification such as Juris Doctorate, CFP, CFA, CTFA preferred

Compensation:

- Compensation will consist of a base salary, commission, and annual bonus