



## Client Relationship Officer

## Full-time | Houston, Texas

At Sentinel Trust, we pride ourselves in providing our families with an exemplary level of personalized service. As a Client Relationship Officer, you will be a member of the Client Service team and work closely with a Senior Relationship Officer to:

- · Build and maintain close relationships with clients to facilitate the delivery of high quality family office, investment advisory, and fiduciary administration services for a portfolio of families.
- · Understand and synthesize your clients' needs, wishes, and goals, and proactively offer thoughtful ideas and insights to help them achieve those objectives.
- · Address challenging situations and resolve complex issues calmly and effectively.
- · Maintain a sensitivity towards our clients' need for confidentiality.

## Skills that would be an asset to this position include:

- · Well-developed critical thinking, deductive reasoning, and problem-solving skills.
- · An affinity for researching unique questions, often of a legal or financial nature.
- · Polished written and oral communication skills.
- · Effective project management skills and ability to manage multiple priorities and cross-functional teams.
- · People management and influencing experience.
- · An aptitude for working collaboratively and efficiently with a wide range of external stakeholders, professional service providers, and vendors.
- · Self-motivation with a strong sense of accountability.

## Desired qualifications to apply for this position:

- · Bachelor's degree required, and JD, CPA, or CFP® strongly preferred.
- · Five to 10 years' related experience.
- · Business-level use of Microsoft Office products, including Word, PowerPoint, Outlook, and Excel is required.
- · Acceptable results on background tests.



Please send your resume to humanresources@sentineltrust.com to apply.