Sentinel Trust
Together, families prosper℠

www.sentineltrust.com

Client Relationship Officer

About

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.

 | T 713.529.3729 | info@sentineltrust.com

- 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.

