



# Operations Associate

## About

### Full-time | Houston, Texas

At Sentinel Trust, we pride ourselves in providing our families with an exemplary level of personalized service. As an Operations Associate, you will be responsible for the timely and accurate processing of transactions and also perform other important Operations functions. The ideal candidate will foster our high-quality customer service environment by working with other members of the Operations team to:

- Accurately process, review, and reconcile transactions through Trust Portal.
- Effectively manage our sweep activity by printing all reports from sweep and posting trades for each at our custodian.
- Skillfully process deposits and disbursements for our clients' accounts.
- Assist with the enhancement of written Operations policies and procedures to ensure proper internal controls and the efficient and accurate processing of transactions.
- Serve as a backup to all other Operations positions (including as the primary backup for our Operations Settlement Associate).
- Process security transactions and perform other duties when needed.
- Address challenging situations and resolve complex issues calmly and effectively.
- Maintain a sensitivity towards our clients' need for confidentiality.

Our Operations personnel are flexible to provide custom services and to accommodate constantly changing service requirements. Accordingly, the ideal candidate for this position should be efficient and accurate at processing large volumes of transactions, are very detail oriented, and are very well-organized.

### 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, or a minimum of 2 years' related experience in trust operations or portfolio accounting.
- Familiarity with investment software (Advent Axys) and trust accounting software (Trust Portal) is a plus.
- Business-level use of Microsoft Office products, include Word, PowerPoint, Outlook, and Excel is required.
- Acceptable results on background tests.

Please send your resume to [humanresources@sentineltrust.com](mailto:humanresources@sentineltrust.com) to apply.