Senior 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 Senior Relationship Officer, you will serve as the primary point of contact for several individual client families and lead a team responsible for executing the day-to-day deliverables of client service, including relationship management, account administration, and fiduciary administration.

Key functions of this position include:

- Leading others and serving as a resource to thoughtfully, timely, and without error:
  - On-board new clients
  - Support client relationships and proactively identify and resolve client issues
  - Administer accounts and perform fiduciary oversight functions
  - Coordinate the delivery of services (internal and external specialists)
  - Prepare and deliver client communications
- Developing an in-depth understanding of client preferences, needs, and concerns, and using that understanding to craft recommendations and deliver timely and creative solutions.
- Interfacing effectively with clients, prospects, and centers of influence to demonstrate the firm's value proposition to support business development and client retention efforts.
- Managing a variety of accounting-related functions, including:
  - Deposit and disbursement transactions
  - Budgets
  - Preparation and filing of tax returns
  - Financial statement analysis
  - Financial transaction reviews
  - Fees and expenses
- Providing trust, estate, and wealth transfer planning advice.
- Engaging in high level trust administration.

- Performing risk management activities for assigned client families.
- Interpreting wills, trusts, and other legal documents.
- Working cross-functionally within the firm to ensure efficient workflows and the maximization of resources firm-wide.
- Creating and maintaining an active network of peers and subject-matter experts to harvest ideas and to cultivate potential professional relationships.
- Fostering positive employee relations and championing the firm's strategic priorities, objectives, and policies.

Skills that would be an asset to this position include:

- Self-motivation with a strong sense of initiative and accountability.
- The ability to quickly adapt to change and skillfully address setbacks or ambiguity.
- Business and financial acumen with an understanding of the firm's objectives, operations, and market environment.
- An aptitude for building relationships, improving team efficiency, and working collaboratively with a wide range of external stakeholders, professional service providers, and vendors.
- A keen eye towards discovering and meeting clients' stated or unstated needs and expectations.
- Polished written and oral communication skills.
- Well-developed critical thinking, deductive reasoning, and innovative problem-solving skills.
- People management and influencing experience.
- A demonstrated ability to timely manage multiple priorities and cross-functional teams.

Desired qualifications to apply for this position:

- JD or CPA required.
- CFP® designation strongly preferred.
- Previous experience and demonstrated success leading client relationships in an entrepreneurial environment required.
- Business-level use of Microsoft Office products, including Word, PowerPoint, Outlook, and Excel, and proficiency with Adobe Acrobat is required.
- Acceptable results on background tests.

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

