

LeTort Management & Trust Company
3130 Morningside Drive
Camp Hill, PA 17011
www.letorttrust.com

Family Wealth Relationship Manager

LeTort Trust is seeking an energetic and motivated Family Wealth Relationship Manager to join its team in Camp Hill, PA. LeTort Trust is a private Trust Company, providing comprehensive Qualified Retirement Plan and Wealth Management services to businesses, institutions, and families.

This position will be responsible for building, developing and managing Family Wealth Relationships for current and future clients of LeTort Trust. Candidate should possess a strong knowledge of investments and the financial service industry coupled with experience in client management. Candidate must be a strong independent thinker that can collaborate well in a team environment. Candidate will be professional, have strong client service and communication skills, be detail oriented and be able to handle multiple tasks accurately and in a timely manner. Candidate will be required to learn proprietary software applications unique to the industry.

Job Duties

Managing client relationships through proactive service and management of their financial affairs; Responding to client inquiries, with ability to research and resolve client issues; Organization and Coordination of all client financial information; Interaction with clients and their other advisors by telephone, meetings, email, written correspondence, etc.

Qualifications

- Bachelor's degree in Business, Finance, Accounting, or related degree
- CFP credentials, preferred but not required
- Knowledge of investments and financial industry
- Excellent written, oral, and interpersonal communication skills
- Strong skills with Microsoft Office (including Excel and PowerPoint)

If interested please email your resume and cover letter to hr@letorttrust.com.

LeTort Trust was formed as an Independent Trust Company to create a specialized wealth management firm combining the investment resources of a large firm, with the highly personalized service found in a boutique wealth management company. LeTort Trust has been serving the central PA market since 2002, providing business owners, executives and individuals with a wealth of experience in the retirement plan services, investment management and personal trust industries. For further information on LeTort Trust, please visit our website at www.letorttrust.com.

LeTort Trust is an Equal Opportunity Employer and considers all qualified applicants regardless of race, gender, color, religion, national origin, age, sexual orientation, gender identity, disability, veteran status or other classification protected by law.

Our Purpose

*We build better lives and brighter futures for our clients,
employees and the communities we serve.*