

Position: Wealth Relationship Manager

Location: This position will work from our office in Camp Hill, PA

Website: www.letorttrust.com

Position Type: Full time

Job Description:

The Family Wealth Relationship Manager will be part of the growing trust company team providing comprehensive Wealth Management services to individuals and families.

The ideal candidate will enjoy working in a collegial, respectful, ethical environment. We value open communications, ingenuity and commitment to meeting our clients individualized needs. This position will interact with a wide range of people, performing outreach with new and existing clients on a daily basis. Interpersonal savviness is key for this position. There will be a fair degree of variety in this role with a balance of consensus building and independent action. Strong detail orientation and follow through are also very important for this role.

LeTort Trust was formed as an Independent Trust Company to create a highly 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.

Key components of this role may include:

- Managing client relationships through proactive service and management of their financial affairs
- Responding to client inquiries, with ability to research and resolve client issues
- Organizing and coordinating 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
- Knowledge of investments and financial industry
- Excellent written, oral, and interpersonal communication skills
- Strong skills with Microsoft Office (including Excel and PowerPoint)

To apply:

Applicants should send their resumes to: HR@letorttrust.com

Our Purpose:

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

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.

