Job Title: Client Relationship Administrator

Location: Mechanicsburg, PA

About Us:

Join a Team Where Excellence Meets Purpose
LeTort Trust is a Private Trust Company providing comprehensive multi-generational wealth planning and streamlined retirement plan design and management for closely held businesses, individuals, and families. At LeTort Trust, we pride ourselves on fostering a culture of integrity, collaboration, and continuous growth. More than just a financial institution, we're a close-knit team, built on a foundation of mutual respect and transparency and dedicated to making a difference in the lives of our clients and the community we serve.

Job Description:
LeTort Trust seeks an energetic and motivated Client Relationship Administrator to join its team in Mechanicsburg, PA. The Client Relationship Administrator will support the Personal Trust/Wealth Management Division.

This position provides essential support to client-facing team members to ensure exceptional client service and smooth operational workflows. The Client Relationship Administrator will handle administrative tasks, prepare client materials, and respond to client requests ensuring timely follow-up. This role enhances the client's experience by maintaining accuracy, professionalism, and proactive communication.

Core Responsibilities:

- Serve as a primary support contact for day-to-day client service requests
- Assist with client account cash disbursements and receipts
- Prepare and process client agreements and onboarding materials with accuracy and compliance
- Track, monitor, prepare and mail client bills
- Monitor client accounts and submit raise funds requests as needed
- Maintain organized digital and physical filing systems for client records

Qualifications:

- Qualified candidates should have several years of experience in business, legal, or banking administrative services with an exceptional track record for reliability and delivering quality results. Certifications and/or degrees in a related field are preferred.

Who You Are:

- An internally motivated self-starter who continuously strives to see projects through to completion
- Excels at managing multiple priorities with precision and consistency
- Demonstrates impeccable attention to detail in all client and administrative workflows
- Ability to communicate in an open, clear, and effective manner
- Maintains organized systems that enhance operational efficiency and reduces errors
- Strong data entry skills and the ability to work across multiple databases and systems are a plus

Why Join Us:

LeTort Trust offers a dynamic, supportive environment where innovation and professionalism are valued. We provide competitive compensation, professional growth opportunities, a rich benefit package, and the chance to significantly impact our clients' financial and legacy planning.

How to Apply:

Submit your resume and cover letter to HR@letorttrust.com with "Client Relationship Administrator" in the subject line.

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. 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.