Northwest Baptist Foundation
Job Description

Job Title:	Trust Officer	**Reports To**	CFO
Employer:	Northwest Baptist Foundation	**Dotted Line Accountability**	President
Location:	Vancouver, WA	**Travel Required**	Yes; up to 25%
Salary Range:	$90k - $125k	**FSLA Status**	Exempt

***Key Responsibilities*:**
- Trust and Endowment Administration
- Asset Management
- Beneficiary Communication
- Tax Preparation
- Project Management and other Duties

Specific Job Duties:

Trust Administration.
- Oversee administration of account portfolio: Charitable Remainder Trusts (CRTs), Revocable Trusts, Irrevocable Trusts and Endowments
- Review account investment portfolios regularly to ensure proper asset allocation
- Consider and bring attention to available or potential tax strategies
- Ensure distributions are timely and consistent with Agreement terms and donor intent
- Review estate plans to ensure that documents and supporting information are appropriate, present, and complete to enable the estate plan to operate as intended
- Maintain working knowledge of laws applicable to Trusts and Endowments
- Approves account payments and distributions (generally daily)

Asset Management.
- Lead creation and implementation of Investment Policy Statements (IPS)
- Monitor portfolio or asset performance
- Develop long-term investment strategies
- Work directly with custodians of other Foundation accounts
- Prepare and deliver Semi-Annual reports to Investment Committee (Board of Directors)

Beneficiary Communication.
- Provide caring and professional customer service to clients during in person, phone, and virtual interactions
- Maintain contact with clients to answer questions and lead through resolution of issues in a timely manner
- Direct interaction with clients on inquiries about Trust/Estate/Personal Finance questions
- Document client interactions on CRM software

Tax Planning and Preparation (1040, 1041, 5227, 706, 709).
- Gather and organize necessary tax reporting forms
- Communicate with clients regarding required reporting and support forms, deadlines, and any subsequent events that may be beneficial in current year return preparation.
- Submit return(s) before the statutory deadline or file extensions as needed

- Document observations during return preparation that may provide tax efficiency and savings to the client and/or his/her estate
- Maintain EA or equivalent designation

Project Management.

- Work with other staff on final administration of terminated accounts – Estate and Trust administration
- Assist with developing, supporting and implementing Estate Plans
- Augment financial care trustors personal and administrative care for clients

Other Duties.

- Sign checks and approve ACHs as delegated
- Creatively employ best practices in the performance of all job duties
- As assigned

Minimum Requirements/Core Competencies.

- Bachelor's Degree (Accounting, Finance, or related field)
- Minimum Experience: five (5) years
- Working knowledge of Trust law and fiduciary standards
- Financial/Investment Orientation
- Robust attention to detail and documentation
- Excellence in verbal and written communication
- Calm demeanor (ability to interact with other staff, clients, vendors, et al, with a Christian Spirit at all times)
- Expertise in Microsoft Office – Outlook, Word and Excel
- Church Membership in a Baptist or other Evangelical Denomination

Preferred Requirements Needed for Success in this Position.

- Certified Financial Planner designation in good standing (or similar credential, i.e., CPA with tax planning and personal financial planning experience, JD, CFA)
- Enrolled Agent (EA)

Physical Abilities Needed for success in this Position.

- Ability to maintain seated position, while maintaining productivity, for up to 4 hours at a time
- Ability to operate a motorized vehicle safely and ability to obtain a license in WA state
- Ability to lift and carry up to 25 pounds

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<tr><td>
<u>Employee</u>

Signature: ____

Date: __________________________, 2026

Employer

Signature: ____

Date: __________________________, 2026
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