Wealth Associate

FULL-TIME • TRUXTON WEALTH • NASHVILLE, TN

TRUXTON

WEALTH • FAMILY OFFICE • BANKING

WHO WE ARE

Truxton is a premier provider of wealth, banking, and family office services for wealthy individuals, their families, and their business interests. Serving clients across the world, Truxton's vastly experienced team of professionals provides customized solutions to its clients' complex financial needs. Founded in 2004 in Nashville, Tennessee, Truxton upholds its original guiding principle: do the right thing. Truxton Trust Company is a subsidiary of financial holding company, Truxton Corporation (OTCPK: TRUX).

MISSION STATEMENT

To do the right thing every day, putting our clients' interests first, with distinctive, comprehensive financial solutions that protect and promote client prosperity and quality of life.

WHAT WE OFFER

- 401k + company match
- Medical, life, dental, vision insurance
- Paid federal holidays and vacation
- Employee assistance program (EAP)
- Support towards continued learning and industry certifications

WHY YOU SHOULD WORK HERE

- Truxton is a highly profitable and growing company that has been recognized by American Banker as the 9th best community bank (top-ranking TN bank) based on 3-year ROAE
- Opportunities to grow your expertise, take on new challenges, and gain exposure to a wide range of sophisticated work
- Because we are a smaller company, you will have the opportunity to chart your own course and contribute to initiatives that go beyond your job title
- Opportunities for incentive bonuses through new business referral

CONTACT

- careers@truxtontrust.com
- 615-515-1700
- 20 Burton Hills Blvd, Suite 200
  Nashville, TN 37215

APPLY NOW

THE ROLE

As a pivotal member of the Wealth team, the Wealth Associate serves as the facilitator of the client experience through direct client interaction and internal coordination with Wealth team members. We are looking for candidates who can efficiently manage a variety of work that changes daily and communicate clearly to deliver premium service to our Wealth clients. The Wealth Associate at Truxton has significant exposure to senior leadership and advancement opportunities within the Wealth Advisory team.

WHAT YOU WILL BE DOING

- Collaborating with Wealth Advisors, other Wealth Associates, and the broader Truxton team including Portfolio Managers, Operations Staff and Private Bankers
- Providing world-class service to clients in a prompt, professional, and personalized manner
- Managing client inquiries and requests and preparing client reports
- Coordinating and participating in client meetings and remain engaged with the client relationship management process
- Assisting in analytical work to support new business opportunities and client presentations
- Utilizing Truxton's primary trust accounting system to document client transactions
- Facilitating the onboarding process for new Wealth clients
- Maintaining a strong understanding of custody, agency, retirement, and trust accounts
- Managing client projects involving financial planning, taxes, spending analysis, etc.

WHAT WE ARE LOOKING FOR

Attributes and Abilities

- Problem solver, able to both diagnose challenges and solve them efficiently
- Curious and excited to learn when presented with a new issue
- Proactive in completing work and advancing goals of Wealth team and company
- Able to seamlessly toggle between independent work and team collaboration
- Detail-oriented and organized
- You prioritize diligence and timeliness

Experience and Skills

- 1-2 years of working knowledge and experience in a professional services firm preferred
- You are proficient with Microsoft Office (Word, PPT, Excel) and CRM tools
- Experience with Trust Accounting systems, BlackDiamond, and CRM preferred

Education and Designations

- Bachelor's Degree in Finance, Accounting, or Economics preferred
- Bonus points: Obtained or are interested in pursuing an Advanced Degree or Professional Designation (CFP, CTFA, CFA, etc.)