



Client Services & Trust Administration Coordinator

This individual will provide administrative and operational support to Lee Bank trust department and October Mountain Financial Advisors. Lee Bank's trust department serves as a fiduciary for a number of single and multi-generational families locally and throughout New England. October Mountain Financial Advisors is a wealth management firm which manages assets and provides financial planning for individual and institutional clients throughout the Berkshires and nationally. This individual will perform confidential private banking transactions and will support the clients of both firms. This role will serve as a dual employee of Lee Bank and October Mountain Financial Advisors.

Lee Bank operates with a Culture of Purpose where our intention is to empower employees, customers and our community by delivering local banking with service, sincerity and simplicity at all points of interaction.

Required Education and Experience

- Education and Experience: High School Diploma, 2+ years of Wealth Management experience and/or 3 - 5 years of banking environment experience.
- Basic understanding of investment products and strategies.
- Obtain Series 99 Operations Professional license.
- Take and pass a Fundamentals of Trust Services course.
- Ability to perform job functions accurately and with attention to detail
- Ability to work independently and in a team environment
- Ability to manage and prioritize numerous projects simultaneously in a time sensitive environment.
- Excellent organizational skills
- Customer service excellence
- Strong oral communications with clear and concise writing skills
- Strong Computer skills, proficient in Microsoft Office, Salesforce, DocuSign, and Zoom

Lee Bank is an Equal Opportunity Employer and strong advocate of workforce diversity.
Race/Color/Gender Identity/Religion/National Origin/Disability/Veteran

Please send resume to: Attention: Susan Brown, Lee Bank 75 Park Street Lee, MA 01238 or email sbrown@leebank.com