

## WHO WE ARE

Truxton is a premier provider of wealth, family office, and banking 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 13th 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
- 4525 Harding Road, Suite 300  
Nashville, TN 37205

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# CLIENT SERVICE SPECIALIST

FULL-TIME • TRUXTON WEALTH • NASHVILLE, TN

## THE ROLE

As a pivotal member of the Truxton Wealth team, the Client Service Specialist 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 Client Service Specialist at Truxton has significant exposure to senior leadership and countless development opportunities for growth in wealth management, planning, and leadership.

## WHAT YOU WILL BE DOING

- Collaborating with Wealth Advisors, other Client Service Specialists, 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

## 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 the Wealth team and company
- Able to seamlessly toggle between independent work and collaborating with a team
- 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
- Experience with trust accounting and CRM systems preferred
- Proficient with Microsoft Office (Word, PPT, Excel)

### *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.)