LETORT TRUST

Job Title: Client Concierge

Location: Mechanicsburg, PA (In person)

About Us:

LeTort Trust is a Private Trust Company providing full-service retirement plan design and management for closely held businesses and multi generation family wealth planning. Our objective is to provide coordinated estate planning, financial, and fiduciary services, integrating a family office model with personalized solutions.

Job Description:

LeTort Trust is seeking an energetic and motivated Office Administrator/Client Concierge to join its team in Mechanicsburg, PA. LeTort Trust is a private trust company, providing comprehensive Qualified Retirement Plan and Wealth Management services, to businesses, institutions, and individuals. This position will be part of the Trust Company operations team.

The Client Concierge will be the first point of contact for our clients and play a crucial role in enhancing their overall experience with our firm. This position is perfect for someone who's proactive, detail-oriented, and enjoys working closely with a small team. You'll have the opportunity to collaborate across different areas of our company, helping us deliver exceptional, client-focused service. The ideal candidate will be an excellent communicator, capable of managing multiple responsibilities, while representing the LeTort Trust values and commitment to exceptional service.

Core Responsibilities:

- Cultivate and build relationships with clients, manage appointments and ensure a welcoming and professional experience from initial contact through ongoing engagement.
- Coordinate and collaborate with internal teams to facilitate client meetings and manage necessary documentation.
- Administrative support including data entry, maintaining client records ensuring accuracy and confidentiality.
- Achieve a comprehensive understanding of fiduciary responsibilities within the company with the opportunity to transition into these roles in the future.

Qualifications:

- Associates or bachelor's degree in business, finance or a related field.
- Front Office, Office Administrator or prior experience in a client-facing role within a financial or trust services environment is a plus.
- Proficient in Microsoft Office 365, Outlook, Excel and Customer CRM.

Who You Are:

- Strong organizational and time management skills, and ability to prioritize.
- Excellent verbal communication and interpersonal skills.
- Ability to treat confidential information with appropriate discretion.
- Open to collaboration and willing to learn and grow.

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 Concierge" 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.