LETORT
TRUST

Job Title: Family Wealth Relationship Manager

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. We seek a Family Wealth Relationship Manager to enhance our team, with a focus on innovative legal consultation, collaboration, and service excellence.

Job Description:

This position will be responsible for building, developing, and managing Family Wealth Relationships for current and future clients of LeTort Trust. The candidate should possess a strong knowledge of investments, and the financial service industry coupled with experience in client management. The candidate must be a strong independent thinker that can collaborate well in a team environment. The candidate will be professional, have strong client service and communication skills, be detail oriented and able to handle multiple tasks accurately and in a timely manner. Candidates will be required to learn proprietary software applications unique to the industry.

Key Responsibilities:

- Manage client relationships through proactive service and delivering high-value management of their financial affairs.
- Act as a true fiduciary to our clients and adhere to compliance standards applicable to the financial services industry.
- Respond to client inquiries, with ability to research and resolve client issues.
- Organize and coordinate all client's financial information.
- Collaborate with internal teams and external advisors to deliver multidisciplinary client solutions.

Qualifications:

- A genuine interest in servicing and caring for people
- Bachelor's degree in Business, Finance, Accounting, or related degree
- CFP credentials, preferred but not required
- Knowledge of investments and financial industry
- Excellent written, oral, and interpersonal communication skills

- Strong skills with Microsoft Office (including Excel and PowerPoint)

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 benefits 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 "Family Wealth Relationship Manager" 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 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.