

**Job Title:** Trust Officer  
**Department:** Trust and Wealth  
**FLSA Status:** Exempt  
**Reports to:** Director of Trust and Wealth

**Chain Bridge Bank, N.A. Overview:**

Chain Bridge Bank, N.A., authorized by the Office of the Comptroller of the Currency (OCC) to exercise full trust and fiduciary powers, is a nationally chartered bank. We provide a full range of banking services, including commercial and personal deposit accounts, mortgages, and loans. Our mission is to combine financial strength, personalized service, and the integration of advanced technology solutions to serve a diverse range of clients, including businesses, non-profits, political organizations, and individuals. Our vision is to grow responsibly adapting our services to the changing needs of our clients, aiming to maintain liquidity and asset quality while seeking to uphold our financial strength. Our tagline, "Strength, Service, Solutions: Your Bridge to Better Banking Nationwide," reflects our commitment to these goals.

**Trust & Wealth Department Overview:**

The Trust & Wealth Department at Chain Bridge Bank N.A. offers a full range of fiduciary services. These services include trust administration, investment management, asset custody, estate administration, and wealth planning. Our team has experience in managing various types of specialized trusts, such as Special Needs Trusts, Settlement Protection Trusts, Land Trusts, and Charitable Trusts. We serve as trustee, co-trustee, successor trustee, agent for trustee, and custodian. We also administer a range of assets, including private assets such as estate, closely held businesses, and mineral interests. Our investment approach, inspired by John C. Bogle's philosophy, generally emphasizes long-term strategies, diversification, and cost awareness. Our aim is to align our services with the goals of each trust we manage, while conscientiously upholding our fiduciary responsibilities.

**General Description:**

As a Trust Officer, you will act as the primary contact for a diverse group of Trust and Estate clients and beneficiaries, as well as wealth management clients, within our Trust and Wealth Department. This role requires a blend of legal or accounting expertise, combined with experience in trust administration and investment management. You will focus on managing trust and wealth management accounts with an emphasis on asset protection, financial growth while adhering to the terms of applicable trust agreements and other governing

documents. You will be a member of the bank's Trust Administration and Investment Committee.

**Qualifications:**

- Law Degree, CPA, or equivalent training (required).
- At least five years of Trust Administrative experience (required).
- Preferred qualifications include Trust Officer certifications, such as the Certified Trust and Financial Advisor (CTFA), other ABA Trust Certifications, the Certified Estate and Trust Specialist (CES™) from the Institute of Business & Finance (IBF), a Certificate in Trust and Financial Advisory Services from either Northwestern Graduate School or Cannon Trust School, or equivalent.
- Strong interpersonal skills (required).
- Knowledge of trust regulations, compliance, and legal matters (preferred).

**Responsibilities and Duties:**

- Act as a central point of contact for trust clients and beneficiaries.
- Administer estate planning documents and ensure legal and fiduciary obligations are met.
- Stay informed about relevant regulations and legal developments.
- Engage in community activities and represent the bank at events.
- Commit to ongoing professional development, ethical conduct, and maintaining certifications.

**Compliance:**

In this role, you must comply with relevant laws and Chain Bridge Bank N.A. policies to maintain a professional and respectful workplace. This responsibility includes adhering strictly to federal and state banking laws, client confidentiality, and internal policies on risk management, safety, and regulatory compliance. Performance evaluations will include compliance with these policies and the completion of required consumer compliance courses.

**Compensation:**

Chain Bridge Bank, N.A. offers competitive pay, a comprehensive benefits package, and participation in the Chain Bridge Bank, N.A. Incentive Compensation Plan. We also value the

professional growth and development of our team members and provide various training and career development opportunities.

**How to Apply:**

Interested candidates should send a cover letter and resume in PDF format to [hr@chainbridgebank.com](mailto:hr@chainbridgebank.com). We encourage qualified candidates to apply and look forward to reviewing your application.