

Position Information	
Working Title:	Lead Asset Alignment Coordinator
FLSA Status:	Non-Exempt
Provisional Period:	90 Days
Department:	Asset Alignment
Assignment Category:	Staff
Office:	Fort Myers
Job Type:	Regular, Full-Time
Job Description Summary:	<p>The Lead Asset Alignment Coordinator works to transfer assets (brokerage, financial and bank accounts) into client trusts by completing change of ownership of account forms, prepares deeds for real property and prepares change of designation of beneficiary forms for IRAs, 401(k)s, annuities and life insurance policies. Experience working in an investment/brokerage firm or trust company is helpful. Excellent communication skills - both written and verbal are a must as you will have direct contact with clients and other related professionals such as CPAs, trust officers and financial advisors. We enjoy a family atmosphere, so we hire those who work well with others. Typing and computer skills necessary, including knowledge of Microsoft Office Suite. Those familiar with Time Matters software will have an advantage in this position. In addition to these responsibilities, the Lead Asset Alignment Coordinator is also responsible for supervising the Asset Alignment Department, training new Asset Alignment Coordinators and leading departmental meetings and innovation. Adaptability and flexibility will qualify you as an exceptional candidate. Attributes that will shine are alertness, curiosity, and responsiveness.</p>
Job Factors	
Minimum Education Preferred:	Bachelors Degree
Experience Level Preferred:	Five years of relevant asset funding, banking and/or financial experience is preferred.
Supervision Received:	The incumbent reports to the Strategic Planning Leader. After initial orientation, the incumbent will be given general direction from the Strategic Planning Leader, but is expected to perform duties and responsibilities independently.
Supervision Exercised:	This position is responsible for supervising the members of the Asset Alignment department.
Scope of Human Resources Impact:	Occasionally responsible for interviewing prospective candidates and providing input into the hiring process.
Level and Nature of Internal Contacts:	The incumbent has regular contact with all members of the team, including all levels of Attorneys and outside vendors. This position also

	includes leading meetings for the Asset Alignment department and providing direction to said department's team.
Level and Nature of External Contacts:	This position requires external contact with existing clients and said client's financial institutions and advisors to discuss details of completing the asset alignment process.