

JESSE KENDALL

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EXCEPTIONAL BANK TRUST OFFICER

Committed to financial strategies that enhance growth and maximize sustainability.

Analytical and results-driven professional offering a unique combination of trust and estate administration and charitable gift planning experience. Expertise in development of short-term and long-term financial plans, investment management, financial problem solving, and compliance.

AREAS OF EXCELLENCE

- Policies/ Procedures
- Trust/ Agency Administration
- Investment Recommendations
- Stewardship
- Gift Administration
- Estate Settlement
- Corporate Liaison
- Asset Allocation
- Relationship Management

PROFESSIONAL SUCCESS

TRUST OFFICER

ABC TRUST COMPANY, Mililani, HI | 20xx to 20xx

Promoted to oversee a diverse account base consisting of 220 accounts/ \$110 million; served as point of contact for agencies, revocable living trusts, irrevocable trusts under agreement, testamentary trusts, charitable trusts,

irrevocable life insurance trusts, and retirement accounts. Functioned as an integral member of internal Trust Investment Committee and made key investment recommendations. Drafted Reg. 9 investment review letters and prepared and filed court accountings on testamentary trusts. Developed marketing materials, Web content, and quarterly publications.

DELIVERED RESULTS:

- Managed all aspects of probate administration for numerous estates; executed decedents' intentions by collecting and safeguarding the assets, determining and paying debts and taxes, making court filings, and distributing assets to the beneficiaries as stipulated.
- Developed and executed annual administrative review procedures to ensure compliance with regulatory requirements.
- Served as the primary Trust Department contact for particular region of bank branch managers; participated in seminars led at branches and local retirement communities.

TRUST TAX OFFICER/ TRUST MANAGEMENT ASSOCIATE

BCD BANK, Mililani, HI | 20xx to 20xx

Executed preparation, review, and processing of fiduciary income tax returns for over 600 trust accounts and individual returns for select clients utilizing the Fast-Tax database. Played an instrumental role in preparation of fiduciary income tax returns for select estates and trusts on fiscal year deadlines.

DELIVERED RESULTS:

- Administered in excess of 170 trust accounts, which were invested primarily in bank's common trust funds.
- Generated a monthly report on the budget variances of each division in the Trust Department.

EDUCATION & CERTIFICATIONS

EXECUTIVE CERTIFICATE FINANCIAL PLANNING

, XYZ University, Mililani, HI | In Progress

- Fundamentals of [Financial Planning](#), Investments, Taxation, Retirement Planning, Estate Planning, Case Course

CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)

, XYZ Personal Trust Graduate Scool, Mililani, HI INSTITUTE OF CERTIFIED BANKERS, Mililani, HI | 20xx

- Trust I, II, and III Courses, Fiduciary Responsibility, Personal Finance/ Estate Planning, Tax Law, and Investment Management, Estate Planning Seminars, National Business Institute