

AMTS Fiduciary Specialist I

Wage Range: Min: \$72,689, Mid: \$95,069, Max: \$117,449

A Brief Overview

The AMTS Fiduciary Advisor I utilizes industry experience to administer low-level complexity fiduciary accounts, ensuring compliance with legal and tax requirements, and providing comprehensive investment and asset management oversight. The Fiduciary Advisor I develops new business through attraction and retention of targeted clients.

What you will do

- Manage client relationships.
- Develop internal and external referral sources.
- Review and interpret trust and estate planning documents with oversight from higher level fiduciary advisor or supervisor.
- Develop business through cultivation of centers of influence and existing relationships.
- Establish appropriate investment strategies.
- Deliver investment performance information to clients.
- Complete regulatory account reviews.
- May serve as an estate settlement administrator.

Other Qualifications/Requirements

- Knowledge of trust accounting software would be a plus.
- Excellent interpersonal, written, and organizational skills.
- Strong client retention skills.
- Bachelor's Degree and minimum 2 years experience in fiduciary administration including estate settlement preferred or equivalent combination of education and experience.
- Certified Trust and Financial Advisor (CTFA) preferred.

Who We Are

Heartland Bank and Trust Company is headquartered in Bloomington, Illinois. With 70+ locations throughout Illinois and Eastern Iowa, Heartland continues to grow and is committed to preserving strong ties to our communities, customers, employees, and shareholders.

Heartland Bank's mission is to "create value for the customer, earn a profit for the Bank, and have fun doing it!" At Heartland, employees have the opportunity to make a difference every day.

What We Offer

At Heartland Bank, we offer a competitive benefits package to provide you with peace of mind. Click [here](#) to learn more about what benefits we have to offer.

Physical Demands

- Regularly: Sitting, Feeling/Touching, Talking, Hearing, Vision - close peripheral, depth
- Frequently: Standing, Walking, Grasping/Reaching - with arms and hands, Repetitive Motions
- Occasionally: Climbing and/or Balancing, Stooping, Kneeling, Crouching, and/or Crawling, Lifting (30 lbs.)

Equal Opportunities and Accommodations Statement

Heartland Bank is deeply committed to creating a workplace where inclusion is not only valued but prioritized. We're proud to be an equal opportunity employer, seeking to create a welcoming and diverse environment. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, gender identity or expression, family status, marital status, sexual orientation, national origin, genetics, disability, age, or any other non-merit based or legally protected grounds.

Salary Disclaimer

The salary range represents the range of possible compensation at the time of posting. Heartland Bank considers several factors when extending an offer, including but not limited to, the role and associated responsibilities, a candidate's work experience, education/training, key skills, and internal equity.

The salary range minimum, midpoint, and maximum listed above represent a full range of career compensation growth over time in this position and pay grade. Starting pay typically starts between minimum and midpoint upon hire. The Bank offers compensation growth opportunities within its career architecture.