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wetrustco.com

Associate

Do you have experience in bookkeeping, fiduciary service or providing personal assistance? Are you looking for a flexible fulltime schedule? WE Trust Company has an opening for an Associate who will work with our clients in the areas of bookkeeping, fiduciary services, bill paying, tax information gathering, estate management, secretarial and personal assistance. The ideal candidate must be honest, thorough, attentive, and dedicated to their work.

Responsibilities:

- Client management: email, problem solving, home visits, cash flow, processing mail. Using Quicken for downloading, reconciliation, and reports.
- Online Banking: bill payment, transfers, account management.
- Work with a team to manage client assets including prepping homes or cars for sale, distributing personal items to heirs, etc.
- Act as a liaison between client and other advisors such as attorneys, accountants, financial advisors
- Anticipate client issues and needs and work behind the scenes to problem solve.
- Strengthen and expand company client base and referral source.

Qualifications:

- Associates degree or equivalent; and/or two to five years related experience and/or training.
- Understand the essentials of online banking, personal bookkeeping, and estate settlement.
- Office management experience particularly in a legal or accounting setting.
- Experience with Quicken or QuickBooks and bookkeeping.
- General understanding of senior/aging related issues and some experience dealing with dementia.
- Comfortable working with clients, sometimes in their homes, possibly under difficult circumstances.

WE Trust Company has been in business since 1997 providing probate assistance, office administration, and bookkeeping/bill paying to our clients. Our goal is to help our clients make sure their lives run smoothly and efficiently. For more information, visit our website at www.wetrustco.com

We offer medical benefits, PTO and holidays, cell phone allowance, Simple IRA plan, education and training opportunities, monthly staff lunches, a flexible fulltime schedule and a friendly work environment. Pay is hourly between \$30-\$35/hr. DOE

WE Trust is an equal opportunity employer and does not unlawfully discriminate against employees or applicants for employment based on an individual's race, color, religion, creed, sex, national origin, age, disability, marital status, veteran status or any other status protected by applicable law.

Submit your resume for consideration to contact@wetrustco.com.