Jose A. Hernandez

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Professional Summary

Administer complicated high net worth trust and estate accounts

- Responsible for 100+ relationships which exceed $50,000,000 in assets
- Review and interpret trust documents
- Consult with Estate Planning Attorneys
- Develop, cultivate and maintain client relationships
- Understand both current income beneficiary & remainder beneficiary interests

Understand Oregon State law in how it pertains to trust and estate administration

- Maintain current understanding of estate planning laws
- Attend seminars / workshops related to industry
- Prepare and present court accountings for court-monitored trusts

Administer accounts in a team environment with external Brokers or internal Portfolio Managers

- Ensure investment objectives meet with governing document and client needs
- Administer 60+ relationships utilizing outside Brokers

Responsible for new business development opportunities

- Understand client needs to identify new business prospects within Private Bank, Mortgage lending, and Personal Banking.
- Develop and maintain rapport with Estate Planning Attorneys, Accountants and Brokers to introduce services offered by the company.

Financial Skills & Experience

- Establish new accounts, coordinate transfer of assets for new relationships
- Coordinate tax preparation with accounting firms for trust and estates
- Document processes within department / company
- Train personnel on trust accounting systems and software applications
- Supervise support staff and assign work duties
- Prepare annual trust account reviews
- Document business continuity procedures for department

Employment History

The Willamette Bank, (formerly Seattle Trust Company), Vancouver, WA 1999 - Present

Personal Trust Officer *1999 - 2003*
Senior Personal Trust Associate *1998 - 1999*
Mutual Fund Trader / Supervisor *1997 - 1998*

Asset Management, Portland, OR 1995 - 1997

Fund Accountant

First Rate Corporation, Columbia, OR 1988 - 1995

Trust Administrator *1993 - 1995*
Funds Management Procedures Analyst *1988 - 1993*
Reconcilement Specialist *1986 - 1988*

Professional Training

Cannon Personal Trust School I, II & III
CTFA Candidate
American Bankers Association
Trust Administration, Communications for Bankers, Trust Operations

Education

Portland Community College, Portland, Oregon AAS, Business Administration 1986 – 1988

References Available upon Request