Samuel Eriksen

TRUST OFFICER

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SUMMARY

Trust officer with 6 years in trust administration at Virginia banks, managing 140 personal trust and estate accounts worth $310M. Reads trust documents closely, approves distributions and works with beneficiaries, attorneys and investment officers. Certified Trust and Fiduciary Advisor with strong attention to detail in fiduciary accounting and tax reporting.

SKILLS

Trust Administration • Estate Administration • Fiduciary Accounting • Tax Reporting • Financial Markets
Excel • Microsoft Office • Attention to Detail • Interpersonal Skills

EXPERIENCE

Trust Officer 09/2022 - Present
James River Trust Company Richmond, VA
Bank-owned trust company with $4B in fiduciary assets.

- Administer **140** revocable, irrevocable and special needs trusts and estates worth $310M.
- Review trust terms and approve 600 discretionary distribution requests a year within policy.
- Complete 12 to 15 estate settlements a year, from asset collection and estate administration to final accountings.
- Coordinate fiduciary income tax reporting with outside CPAs, filing every 1041 return on time for 3 years.

Trust Administrator 06/2020 - 08/2022
Old Dominion Bank & Trust Richmond, VA
Wealth management division of a regional bank.

- Processed cash and securities transactions for 250 trust accounts with zero audit exceptions in 2021.
- Reconciled 250 account statements monthly in Excel and the trust accounting system.
- Drafted 80 annual account reviews a year for 3 trust officers, covering asset mix and financial markets changes.
- Answered 40 beneficiary calls a week on distributions, statements and tax forms, explaining trust terms in plain language.

Bank Teller 08/2018 - 05/2020
Capital Region Credit Union Richmond, VA
Part-time role while studying finance.

- Handled 80 member transactions a shift with a balanced drawer at every daily count.
- Prepared deposit and check-hold reports with Microsoft Office tools for the branch supervisor.
- Referred 25 members to the credit union's estate and trust services partner for wills and trust planning.

EDUCATION

Bachelor of Science 05/2020
Virginia Commonwealth University Richmond, VA
Finance

CERTIFICATES

Certified Trust and Fiduciary Advisor (CTFA)
American Bankers Association
05/2024