Makali Brahler

Trust Officer

Profile

Trust Officer with 2 years of experience in providing comprehensive trust administration, estate planning, and wealth management services. Skilled in managing client relationships, interpreting trust agreements, and ensuring regulatory compliance. Demonstrates a strong commitment to delivering tailored financial solutions that meet clients' unique needs and objectives. Proven success in collaborating with internal and external partners to achieve desired outcomes and enhance client satisfaction.

Employment History

Trust Officer at Zions Bank, UT

Apr 2023 - Present

- Successfully managed a portfolio of over 150 high-net-worth clients, with assets totaling more than $250 million, resulting in a 20% increase in revenue for the Wealth Management division in 2020.
- Streamlined the trust administration process by implementing new software and technology tools, reducing the average time spent on administrative tasks by 30%, allowing for more time to focus on client relationships and business development.
- Spearheaded the development and implementation of a comprehensive financial education program for beneficiaries, leading to a 15% increase in client satisfaction ratings and 10% growth in new trust accounts in 2019.

Assistant Trust Officer at Wells Fargo, UT

Jul 2021 - Feb 2023

- Successfully managed a portfolio of 75 trust accounts with total assets exceeding $100 million, ensuring timely and accurate administration while maintaining excellent client relationships.
- Streamlined the trust account review process, reducing errors by 30% and increasing efficiency by 20%, resulting in improved client satisfaction and enhanced team productivity.
- Spearheaded the implementation of a new trust management software, leading to a 25% reduction in manual data entry tasks and enabling the team to focus on more value-added activities.

Education

Bachelor of Business Administration in Finance or Trust Management at University of Utah, Salt Lake City, UT

Sep 2017 - May 2021

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets, Risk Management, Trust and Estate Planning, Taxation, and Portfolio Management.

Certificates

Certified Trust and Fiduciary Advisor (CTFA)

Mar 2022

Details

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Links

linkedin.com/in/makalibrahler

Skills

- Fiduciary expertise
- Estate planning
- Tax knowledge
- Investment management
- Risk assessment
- Client communication
- Regulatory compliance

Languages

- English
- Bengali

Hobbies

Collecting vintage coins and banknotes

Gardening and landscape design

Photography and photo editing