

TRUSTS, ESTATES & VALUATIONS ADMINISTRATOR

New York

The Trusts, Estates & Valuations (TEV) Administrator will work with and support the Trusts, Estates & Valuations team, which is led by the Director of Trusts, Estates & Valuations.

In this role, The TEV Administrator is responsible for supporting a wide range of administrative, financial and logistical activities for the Director of Trusts, Estates & Valuations and the team of Account Managers. These responsibilities cover all areas of valuations/appraisals and consignments, ensuring appraisals are consistent and efficient while adhering to USPAP requirements. This role will also support other Business Development activities, including the timely update of Phillips' Client Development System (CDS) with TEVs-related client information as well as supporting conferences and events.

Duties and Responsibilities

- Field requests on behalf of the department to determine whether appraisals are single vs. multi-departmental. If single department, then pass along to the appropriate Specialist or Administrator to manage the process.
- Type multi-department appraisals and circulate to the relevant specialists for pricing.
- Review appraisals that need to be finalized by TEV and facilitate the appraisal agreement, affidavit, etc. to ensure all appraisals are following protocol.
- Answer general appraisal-related questions regarding USPAP compliance, billing (if necessary) etc.
- Maintain the department project runner on a real-time basis, regularly reviewing with team members and generating all related stats or reporting from the data as required.
- Keep the Trusts, Estates & Valuations department members and Director informed of all activity and updates on a timely basis, escalating time-sensitive items as needed.
- Liaise with the specialist and legal departments to prepare contracts and ensure appropriate KYC documentation is in order
- Assist with shipping quotes and organizing pick-ups
- Keep an ongoing runner of any unsold works to ensure they are returned in a timely manner
- Update current referral source lists following every conference
- Assist with conference organization, shipping etc.
- Work closely with the Events team to support onsite breakfasts, lunches, cocktails, and offsite lunch and learns, coordinating all logistics or assembling materials as needed
- Maintain relevant files, corporate documents, databases and systems in an efficient manner.
- Perform any other ad-hoc duties as requested.

Professional Skills and Experience

Education and Training

- Bachelor's degree, required.

- Art History background desirable.
 - Graduate degree or 2 years of professional experience, required.
 - Computer literate and proficient in Microsoft Office Software (Excel, Outlook, Word and PowerPoint), required.
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Personal Attributes

- Ability to communicate in a professional manner with a wide variety of people including written and verbal communication.
 - Excellent time management skills with the ability to work under pressure and prioritize to meet strict deadlines
 - Ability to work individually on own initiative and as part of a team.
 - Ability to deal effectively and efficiently with multiple tasks while maintaining meticulous attention to detail.
 - Proactive with Excellent organization skills.
 - Ability to work professionally and collaboratively with all other areas within the business.
 - Ability to handle confidential information discreetly and responsibly.
 - Ability to learn Phillips' internal programs, systems and software.
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Working Conditions

- Work is currently performed both onsite within our 432 Park Avenue office location and remotely until further notice, subject to scheduling requirements.
 - Flexibility with working hours including some evenings and weekends.
 - Some local travel may be required, subject to travel policy and health advisories.
 - Newly hired staff must be fully vaccinated by their start date. Applicants unable to comply with this policy due to an underlying medical condition or sincerely held religious belief may be eligible for an accommodation, unless such an accommodation would be unduly burdensome or present a direct threat to the applicant, our employees, or the members of our greater community.
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Please submit your resume and cover letter to Careersus@Phillips.com. Please use the subject header "TEV Administrator". Please be advised: due to the high volume of applicants, we are only able to contact those candidates whose skills and backgrounds best fit the needs of the open position.