



Example of Trust Accountant Job Description

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Our innovative and growing company is looking to fill the role of trust accountant. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for trust accountant

- Trust, Estate, and Gift tax consultation meetings with clients and Principals
- Additional related duties and projects
- 3 to 5 years' experience in public accounting, trust department or law firm
- Expertise in Fiduciary Income, Estate, and Gift taxation
- CPA or EA designation (or CPA candidate) preferred but not necessary
- A positive, consultative approach to clients and team members
- Knowledge of tax preparation software , OneSource, ProSystem, GoTax
- Knowledge of PFX engagement software helpful
- Comfortable working in a paperless environment
- Ability to interpret estate planning documents

Qualifications for trust accountant

- Proven knowledge and experience in a financial services environment including Investment Trusts' report & accounts production
- Detailed understanding and experience of the AIC SORP
- A good knowledge of the AIC Code of Corporate Governance, Policy and technical releases
- Possess strong numerical and written skills
- Experience in Client Trust Accounting and/or the Entertainment Industry a plus
- Be proactive in identifying opportunities to continually drive further service improvements