Example of Trust Manager Job Description

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Our company is growing rapidly and is hiring for a trust manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for trust manager

- Participate and contribute to ongoing development of Investment Trust department structures, processes and controls
- Own and agree corrective action items with the Internal Audit and Management Assurance for items related to the Trust Office
- Reviewing and analyzing trust documents, Last Will and Testaments, powers of attorney, health care directive, shareholder agreements, and other related documents
- Engagement planning, organization, and delegation to maximize efficiency & effectiveness, achieve quality goals, maintain productivity, and maximize realization
- Performing research using CCH Intelliconnect, RIA Checkpoint and/or BNA Online
- Managing client assignments and assuring timely filing of all related tax returns
- Developing outside relationships with a goal of fostering business development opportunities through involvement in leadership roles in professional groups, community service, and personal relationships with other professional advisors such as attorneys, investment advisors, insurance advisors, private bankers
- Prepare Trust Accountings and Trust and Estate tax returns
- Planning for trusts and estates
- Preparing 709s, 706s and 1041 forms

- Strong relationship building to maintain positive working relationships with peers, management and clients Strong relationship building to maintain positive working relationships with peers, management and clients
- Commitment to ethical and professional behaviour Commitment to ethical and professional behaviour
- Commitment to on-going learning, implementing new knowledge into practice Commitment to on-going learning, implementing new knowledge into practice
- 3 years relevant experience is desirable
- Excellent organisational skills Excellent organisational skills
- Significant experience servicing Fiduciary and High Net Worth individual clients & their related entities, businesses, & families while working with their various professional advisors (attorneys, estate planners, investment advisors, insurance advisors)