



Example of Trust Manager Job Description

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Our innovative and growing company is looking for a trust manager. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for trust manager

- Manage Delaware-based trust administration staff, including 6 direct reports who administer 800+ trusts organized under Delaware law created by clients of Fiduciary Trust
- Oversee administration of all Delaware trust accounts
- Oversee administration of Unique Assets held in Delaware trusts
- Respond to Internal Audit, Compliance and to requests from Delaware banking regulators
- Proactively develop talent based on business needs, clearly articulate and advocate corporate initiatives, and champion a culture of continuous improvement and change
- Develop clear and concise recommendations, prepare and deliver well-designed presentations, practice exceptional interpersonal skills and develop consultative relationships with trusted internal and external business partners
- Act as a member of the Operating Committee of Fiduciary Trust and serve on various committees of FTCl to improve policy, process and procedure in the administration of trusts and client accounts
- Manage an investment trust team ensuring appropriate staffing and structures in place to deliver required Investment Trust services
- Plan, organise, manage and monitor the team activities and performance to deliver agreed client service in accordance with SLAs and the regulatory / statutory requirements
- Review and sign-off of accounts files, board papers, proof reports and other

Qualifications for trust manager

- 6 years or equivalent of trust compliance or audit experience
- Fiduciary Examination experience with the OCC, FRB or State Regulators
- Professional certification in Trust/Wealth Management Compliance
- Bilingual fluency in French and English is preferred
- Or related experience
- Previous experience with Trust and Estates