



Example of Trust Manager Job Description

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Our growing company is looking to fill the role of 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

- Production of annual accounts for complex trusts and companies that are either part of a structure or individual entities
- Responsibility for conducting the verification of ownership and value of assets and liabilities for those areas not assigned to an Asset Management Team for verification during the year under review
- Managing or mentoring other members of the team – including workflow, quality of work, staff assessment, learning and development and career progression as required
- Provide tax planning and consulting to our firm's high net worth clients for estate and individual income taxes
- Manage, coach and mentor less experienced staff
- Performs account administration functions to meet or exceed service level standards and in methods to achieve the highest customer satisfaction, efficiency and compliance levels
- Responds timely to management, client, client's agents or partner's inquiries as requested
- Provide high level personal income tax and estate tax compliance services estate planning advisory services
- Review and prepare individual, fiduciary, estate and gift tax returns
- Prepare and review estate and trust fiduciary accountings

Qualifications for trust manager

- Extensive experience coordinating activities of diverse, global, functional teams -Extensive experience working with various projects and/or software development methodologies
- Knowledge of trust operations and accounting systems, usually acquired through related experience, is needed to manage relationships and administer master trust and custody accounts
- This role will be suited to an A-level student with Grades at C or above
- ICSA Certificate/Diploma is desirable but not essential
- The ideal candidate will have strong investment knowledge, to include alternative investments
- Working knowledge of Global Custody