

TRUSTS MANAGER

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| Job Title | Trusts Manager |
| Salary Scale | Competitive |
| Working Pattern | 9am – 5pm, Monday to Friday with one hour for lunch |
| Job Purpose | To take for responsibility for client accounts including personal accounts, and where appropriate, trust accounts and charity accounts. |
| Management responsibility | None |

Main Duties and Responsibilities

- Support the firm in its intention to be a leading firm of private client solicitors
- Strive to provide an excellent service to both our internal and external clients and actively identify areas where the service can be improved
- Take a pro-active approach towards resolving any issues or problems that our clients may experience
- Take responsibility for the allocation of all client accounts (including personal accounts, and where appropriate, trust accounts and charity accounts)
- Take responsibility for the cash management service for personal clients and trusts when required
- Assist in managing the package of compliance services included in the firm’s trust administration practice (including the Trust Registration Service, AML requirements, record keeping, and monitoring key dates)
- Ensure records are maintained and kept up to date by the firm’s trust administration practice and cash management team.
- Ensure all processes are efficiently managed and subject to regular checks.

Skills, knowledge and experience

- Previous experience working in a similar role is essential
- A commercial focus in managing workload effectively and efficiently
- Mindset to exceed team and client expectations
- Ability to work independently as well as part of a team
- Positive attitude with an ability to take initiative and be proactive as well as reactive
- Well-developed interpersonal, social and communication skills

- A high level of accuracy and strong attention to detail
- Excellent numeracy skills
- Excellent organisational skills and the ability to prioritise tasks
- Proficient in using Microsoft Office applications including Outlook, Teams, Word and Excel
- Genuine enthusiasm to continue developing both personally and technically
- An eagerness to contribute towards the overall strategic objectives of the firm.

This job description provides an overview of the key duties and responsibilities for this role and is not intended to be exhaustive.