

Whitmill Trust Company Limited

Trust and Company Administrator

Job description:

Reports to:	Trust Manager
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Main job purpose:	<ul style="list-style-type: none"> • To provide trust and company administration services, including progressive client contact in a professional manner and in accordance with regulatory requirements, service levels and company standards so as to meet client expectations. • To administer an allocated caseload of more medium and low risk clients, competently and autonomously with the necessary support of other team members. • If appropriate, responsibility for the training and development of junior administrators
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Key duties and responsibilities:	<ul style="list-style-type: none"> • Administration of a medium / low risk portfolio of trust and companies and seeking guidance or verification where necessary and assisting with a range of day to day administrative tasks. • Contact with a portfolio of clients, principally by letter, e-mail and telephone. To enhance and maintain client relationships. • Liaising with external advisors including investment advisers, asset managers, lawyers, accountants, brokers, tax advisers, auditors and other third parties as necessary regarding client affairs • Assist with ensuring that all client requests/documentations are completed accurately and in a timely manner, taking action to improve the completeness of data and information • Plan and prioritise own workload to ensure that target/deadlines are achieved • Comprehensive annual review of trusts and companies within portfolio • Closure of accounts per standard checklist • Company / Compliance procedures and to ensure satisfactory completion to the agreed timescales. • Ensure all written and verbal communication is of the highest professional standard
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	<ul style="list-style-type: none"> • Maintaining records of daily time spent on time billing modules • Assist with complying with all regulatory and legislative requirements in accordance with the regulatory licenses held by the business, including any codes of practice and regulatory guidance • Study towards a Trust and Company qualification recognised by the JFSC, such as STEP or ICSA and/or maintain competency by undertaking relevant CPD • Any other tasks as may be required from time to time
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Technical skills	<ul style="list-style-type: none"> • Good standard of oral and written communication skills. • Able to learn and has problem solving skills • Self motivated and have the ability to work under pressure. • The ability to deal with client and professional advisors thereby showing a commitment to providing a quality service. • Good internal personal skills, the ability to work within allocated deadlines and according to instructions and company procedures • Ability to work as a team member, communicate with colleagues and contribute to the successful performance of the company • Able to work on own initiative in all aspects of work allocated, managing own workload in order to complete tasks on time and have the ability to make decisions in accordance with company procedures • Good organisational and administrative skills
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Professional qualifications:	Essential requirements	Desired requirements
	Study towards a Trust and Company qualification recognised by the JFSC, such as STEP	

For more information and to apply for this position please contact HR@Whitmill.com