FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $7 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Greensboro, Memphis and Nashville.

POSITION
Trust and Estate Specialist

OFFICE
Memphis

SUMMARY
Diversified Trust is a growing company, looking to add to our Memphis team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT
HR@diversifiedtrust.com

FOR MORE INFO ON DTC
diversifiedtrust.com
Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:
This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

Job Summary:

The Trust and Estate Specialist is a highly-experienced professional who works in partnership with a team of client service professionals to provide specialized trust and estate guidance in the management of client relationships. The Trust and Estate Specialist serves as an advisor to the client team on matters of fiduciary administration including discretionary decision-making.

Primary Duties and Responsibilities:

The primary responsibilities of this role will include consulting with client teams on all matters of fiduciary administration. As a senior member of our team, the Trust and Estate Specialist will promote and foster a culture of collaboration, best practices and teamwork across the firm on fiduciary matters. The Trust and Estate Specialist will often have dual responsibilities by also serving as a Relationship Manager and/or Wealth Strategist. Specific responsibilities include, but are not limited to, the following:

- Oversee the trust acceptance process for designated office including review of trust documents, facilitation of outside counsel reviews and completion of required documentation for new trust relationships
- Prudent management of business risks associated with prospective new fiduciary business
- Active participation in corporate projects related to fiduciary issues including development of new policies and procedures
- Provide guidance to client teams in dealing with fiduciary matters including discretionary distributions, fiduciary taxation and compliance, beneficiary education and any other trustee related services
- Assist in Wealth Strategies advisory services related to the use of trusts in client financial and estate planning
- Leadership in promotion of company mission, vision, values and culture
- External industry knowledge development and sharing
- Serve as a resource to client teams in appropriately completing administrative reviews of fiduciary accounts
- Cultivate and maintain relationships within the local community of trust and estate attorneys and CPA’s

Skills/Competencies necessary for this job include:

- Bachelor’s degree required; advanced degree preferred
- CPA, CTFA, CFP, JD or advanced designation preferred
- Minimum of 5 years related experience required, 7-10 years of fiduciary administration experience preferred
- Experience working closely with clients and centers of influence consistent with our firm’s target market
- Demonstrated ability to develop and onboard new business successfully
- In depth knowledge of the application of wealth management disciplines such as financial planning, trusts and estates, foundations and endowments, planned giving and investment strategies
- Ethical practitioner with the ability to exercise sound judgment and effectively manage risk
- Strong analytical abilities and excellent attention to detail
- Excellent writing and communication skills
- Strong work ethic with ability to work under pressure and handle multiple tasks

If this job seems like a good fit, please email your resume to HR@diversifiedtrust.com