

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

Fiduciary Services Associate

OFFICE

Nashville preferred

SUMMARY

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

CONTACT

HR-Nashville@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 reflection of those principal job elements essential for making decisions related to job performance, employee development and compensation. As such, the incumbent may perform other duties and responsibilities as required.

Job Summary:

The Fiduciary Services Associate FSA aids in the effective and efficient administration of Diversified Trust Company fiduciary responsibilities identifying significant risks to the Firm while keeping informed of industry actions and trends. The FSA will assist with development and implementation of processes and procedures relating to fiduciary administration and compliance or in close proximity with the Senior Fiduciary Officer, the Chair of the Trust Investment Committee and the Firm's client service professionals particularly Trust and Estate Specialists.

Primary Duties and Responsibilities

The primary responsibilities of the FSA include, but are not limited to, the following:

- Organize research and coordinate creation of materials for regular Fiduciary Services updates and training to internal colleagues while serving as an ambassador for DTC Fiduciary Services to internal and external audiences
- Assist Senior Fiduciary Officer with management of non-platform and excluded asset processes and procedures
- Manage pledged account requests, draft legal documentation and communications with outside financial firms for review and approval of Senior Fiduciary Officer
- Facilitate insurance policy management, including policy reviews with outside specialists, maintain policy ratings data and annual policy statements
- Preparation, administration and communication of the agenda, minutes and reports for the Trust & Investment Committee
- Manage Outside Counsel Review process and assist trust and estate professionals on new fiduciary appointments
- Support Chief Compliance Officer with Tennessee Department of Financial Institution (TDFI) audit requests and questions
- Assist DTC compliance professionals with internal audit systems, related file work and exception tracking and resolution, including reports to Audit and Risk Committee

Skills and Qualifications:

- Associates Degree (or comparable professional certification such as paralegal training) required; Bachelor's degree in Business or related field preferred
- 3 to 5 years of compliance or legal services experience with a wealth management, trust, or financial services institution preferred
- Ethical practitioner with the ability to exercise sound judgment
- Ability to develop trust and build internal and external relationships
- Strong analytical abilities and excellent attention to detail with the ability to work under pressure and handle multiple tasks within deadlines
- Excellent writing and communication skills
- Proficient in Excel, Word, PowerPoint and some experience with financial technology platforms (TrustDesk, ClientPoint, BlackDiamond, etc.)

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