

JOB DESCRIPTION

Job title	Trust Manager
Location	Cambridge, Cambridgeshire
Department	Private Clients
Line manager job title	Partner

Overview

The Trust Manager will work alongside partners to achieve the firm's strategic goals. This includes proactively managing a portfolio of clients as well as providing top-tier technical support, particularly for planning opportunities, and ensuring all technical work meets the firm's high standards. Collaborating with partners and colleagues to deliver exceptional service for Trusts, Estates and High Net Worth Individuals (HNWIs) and their families.

Key accountabilities

- Effectively managing a portfolio of clients ensuring that all relevant compliance deadlines for both trusts and individuals (income tax and IHT) are met.
- Managing casework efficiently including delegation to, and training of, colleagues.
- Assisting partners and directors with advisory projects including setting up and closing trusts.
- Attending client meetings as required.
- Assisting with estate administration including preparation of probate application, estate accounts and IHT returns.
- Keep abreast of the latest technical developments, and new areas within the Trust arena. Share knowledge, attend relevant events, and read industry journals.
- Identify and convert marketing opportunities, including offering additional services, to new and existing clients. Assist in preparing fee quotes for new work.
- Maintain and provide the highest standards of client care.
- Ensure accurate and prompt billing and proactive debt collection.

Person Specification

- Relevant demonstrable experience gained within trust and probate professional services. Formal qualifications are not necessarily required but CTA, STEP or CILEX considered a bonus.
- Excellent knowledge and experience managing personal and trust compliance (accounts, income tax returns and IHT returns), TRS reporting, estate accounts and tax returns and ideally probate work.
- Experience in advising onshore trusts. Offshore trust experience would also be helpful.
- Encouraging and motivational to train and develop team members.
- Excellent communication skills with the ability to build positive relationships across all levels of the organisation and clients.
- Proficient attention to detail to ensure accuracy.
- Ability to balance multiple priorities and deliver to strict timelines.