

## **First Fiduciary Corporation - Trust Care Manager Position**

### **Job Title: Trust Manager**

City, State or Zip Code: Eagan, MN, 55123 USA

Job Description: Banking / Investments / Business

Status: Full-time Position

Start Date: December 1st 2021

Reports to: Director of Estates and Trusts

Employee Benefits: Competitive Salary and Benefits Package

### **Main functions:**

The Trust Manager will carry out the duties of Trustee or other fiduciary services as an agent of First Fiduciary Corporation.

### **Duties:**

- Review legal documents and statute to fulfill the legal requirements of the trust administration with emphasis on Special Needs Trusts and Supplemental Needs Trusts
- Meet and form a working relationship with clients of varying capacity and/or different cognitive and physical abilities
- Manage trust financial affairs
  - Meet directly with clients to review budgets, accountings, and discuss the goals of the trust
  - Authorize trust expenditures
- Apply for, complete reports, and ensure continuation of benefits to which client is entitled
- Manage documents including invoices, deposits, statements, legal documents, and other important information
- Secure and oversee financial assets and accounts including checking, savings, CDs, stocks, mutual funds, real estate, and other investments
  - Open, close, and retitle trust financial accounts and investments
  - Secure and manage homestead, personal items, and other real estate
  - Manage the distribution and/or sale of real estate and personal property
- Complete required forms including trust inventories and accountings
- Appear in court to be appointed trustee or as needed to carry out the duties of the trustee when the Vice President of Operations or Director of Estates and Trusts are unable to do so
- Coordinate with other services including contractors, estate sale or auction companies, and accountants
- Obtain and provide the required forms for completion of tax returns
- Maintain detailed activity log of all services and activities performed on behalf of clients
- Maintain client files
- Perform other duties as assigned

### **Position Requirements:**

- College degree in Human Services Finance, Banking, Accounting, Law, or another relevant field.
- Two or more years of experience working in trust related services or four or more years working with individuals of various levels of capacity in a financial environment

- Valid driver's license
- DHS background check

**Qualified Candidates should submit a Cover Letter, Resume and Salary Requirements to HR@FFCorp.com**

Hiring Company: First Fiduciary Corporation (FFC)

Are you a detail-oriented individual who enjoys working in a fast-paced environment?

Become a part of our growing company!

Company Profile: First Fiduciary Corporation (FFC) is a Professional Fiduciary Agency created in 1969. FFC provides personal and financial services to a wide variety of individuals and has served the needs of clients and their families for nearly 50 years. The Agency acts as Guardian, Conservator, Care Manager, Trustee, Personal Representative/Executor of Estates, Attorney-in-Fact/Power of Attorney or Representative Payee and is engaged by individuals, banks, attorneys and family members to provide advice or assistance with financial and care management decisions.

First Fiduciary Corporation is an Equal Opportunity Employer.