

First Fiduciary Corporation - Trust Manager Position

Job Title: Trust Manager

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

Job Description: Banking / Investments / Business

Status: Full-time Position

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
- Meet and form a working relationship with clients of varying capacity and/or different cognitive and physical abilities
- Collaborating with VP of Investments and Accounting Department to 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
- Manage overall trust administration including, but not limited to:
 - 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
 - Participate in completion of 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 Trust Services are unable to do so
- Coordinating other services including contractors, estate sale or auction companies, and accountants when necessary
- 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 electronic and physical client files
- Perform other duties as assigned

Position Requirements:

- College degree in Finance, Banking, Accounting, Law, Human Services, Social Work, 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 or human services capacity.
- 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!

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 over 50 years. The Agency acts as Guardian, Conservator, Care Manager, Trustee, Personal Representative/Executor of Estates, Attorney-in-Fact/Power of Attorney, Health Care Agent 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.