# Trust & Estate Specialist

**Reports to:** COO

## GENERAL DESCRIPTION

We are a wealth management firm that believes in building lasting relationships with our clients based on trust, transparency, and personalized service. We are committed to helping our clients achieve their financial goals in a welcoming and collaborative environment. We offer objective advice, tailored strategies, and a genuine dedication to client success.

The Trust & Estate Specialist is a subject matter expert who plays a key consultative role at the firm. This position supports our Wealth Managers (WMs) by providing deep expertise in three critical areas: analyzing complex client estate plans, elevating our team's internal knowledge, and assisting with new business acquisition. You will act as the firm's central resource for trust and estate matters, ensuring our clients receive sophisticated and comprehensive guidance.

## DUTIES AND RESPONSIBILITIES

**Trust & Estate Analysis & Client Support**

- Join Wealth Managers in identifying trust and estate planning needs of existing and prospective clients.
- Analyze client trust and estate documents and communicate findings to Wealth Managers, clients, and other professional advisors as appropriate.
- Lead or assist in the review of trust and estate planning documentation.
- Communicate complex trust and estate concepts clearly and effectively to clients.
- Assist Wealth Managers with client meeting preparation, including organizing materials and documenting follow-up items.
- Maintain organized records to support ongoing client service and planning efforts.

**Internal Guidance & Continuing Education**

- Monitor developments in trust and estate planning, tax regulations, legal changes, and related topics.
- Share relevant knowledge and updates with staff through group presentations and individual consultations.
- Serve as a firm-wide resource for trust and estate questions and planning considerations.
- Provide expertise related to philanthropic planning and charitable-giving strategies.

**Business Development & Professional Networking**

- Collaborate with the marketing and business development team on trust and estate planning opportunities.
- Assist in the analysis of prospective client situations and identify planning opportunities
- Support referral-source development efforts with attorneys, CPAs, and other trust and estate professionals.
- Network with outside professionals to increase awareness of the firm's trust and estate capabilities.
- Contribute to thought leadership through writing, speaking engagements, and educational content.

## QUALIFICATIONS

- Experience: Significant, proven experience in all aspects of trust and estate planning is required.
- Expertise: A broad understanding of financial markets, investment services, and wealth management terminology.
- Analytical & Organizational Skills: An exceptional ability to prioritize complex assignments while maintaining a keen analytical eye for detail.
- Initiative & Problem-Solving: A resourceful and proactive approach, with the proven ability to work independently and find solutions to unique challenges.
- Communication & Collaboration: Excellent communication skills with a demonstrated ability to explain complex topics clearly and a focus on fostering goodwill with clients and internal teams.
- Integrity & Discretion: Unwavering reliability and trustworthiness, with a deep commitment to maintaining the highest level of client privacy and confidentiality.
- A Certified Trust & Fiduciary Advisor (CTFA) designation is a plus for this role.
- Having a JD degree is not required but highly valued.

Employment contingent upon successful background and credit checks.

Please contact Shari Cown at shari@scconsultingsvcs.com with any questions or interest.