



Lombard Odier Trust (Bermuda) Limited invites applications for the position of:

TRUST RELATIONSHIP MANAGER / SENIOR VICE PRESIDENT

Lombard Odier is an independent Geneva based private bank, specializing in private and institutional asset management and estate planning. The Group has an international reputation for excellent client service delivered by highly skilled professionals. Lombard Odier has had a trust license in Bermuda since 1992, specialising in trust formation and administration, estate and succession planning, corporate and custody services.

Operating in a business focused environment that prides itself on operational excellence, the successful candidate will report to the President & CEO. The core responsibilities will be as follows:

Duties and Responsibilities:

- Liaising with clients and administering a complex portfolio of trusts and underlying companies together with providing guidance and support to clients
- Liaising with, among others, Client Relationship Managers, legal & tax advisors, investment managers
- Managing a small team of Trust Administrators
- Able to undertake frequent travel, primarily to Europe, in conjunction with client services and business development
- Keeping abreast with new developments, policies and laws concerning the relationships, tax and estate planning including new tax regimes in the UK, US, Switzerland
- Ensuring compliance with regulatory matters
- Supporting management on a wide range of practical business matters

Required skills and experience:

- Minimum of 10-15 years' experience in trust and / or corporate administration
- A Common Law degree is preferred with a minimum of 10 years' post qualification experience in a private client or trust environment. A TEP designation is desirable
- Proven expertise in a broad range of legal issues affecting international private clients including tax, trusts and corporate structures
- Knowledge of FATCA, CRS and the affect and reporting for trust / corporate structures
- Exposure to multi-jurisdiction tax considerations required including knowledge of Swiss forfait / cross border, UK resident non domicile regime, foreign grantor trusts and underlying companies
- Excellent oral and written communication skills as well as interpersonal skills, together with the ability to tactfully interact and develop relationships with high net worth private clients
- Knowledge of French and / or Spanish in particular or a second language is required
- Exposure to offshore jurisdiction trust/company law and administration; asset administration, investments (marketable securities, real estate, closely held companies) and compliance
- Proficient in, or at minimum, basic understanding of Financial Statements
- Strong analytical skills, work ethic and deadline orientated
- Ability to interact with clients, portfolio managers and service providers
- Must possess strong administrative skills with a willingness to process general tasks relating to Trustee services
- Ability to multi-task and work flexibly as part of a team demonstrating strong organizational and time management skills with the capability to thrive under pressure
- Proficiency with Microsoft Office Suite applications and Viewpoint Information Management System
- Willingness to work extended hours is essential to cater to clients operating in different time zones
- Proven ability to exercise discretion and confidentiality

If you are interested in this excellent opportunity to develop your career within a renowned international financial services group, then please send a detailed CV in confidence to:

Human Resources

Lombard Odier Trust (Bermuda) Limited

P.O. Box HM 2271

Hamilton HM JX

e-mail: a.lee@lombardodier.com

Telephone: 292-7817

All short-listed candidates will be subject to full and complete background checks.

Closing Date: 25th January, 2017