



**Meritus Trust Company Limited**, a dynamic, award winning Trust Company, is seeking an energetic, self-motivated qualified professional interested in an exciting development opportunity in the role of Trust Officer, contributing to and growing in an environment that promotes professional development and rewards strong performance.

## **Trust Officer (Development Opportunity)**

Reporting to the Senior Trust Officer/Fiduciary Director, the Trust Officer will be responsible for:

### **Roles and Responsibilities:**

- Administration and management of a portfolio of complex trust and company structures in accordance with the constitutional instruments and company policies and procedures.
- Assisting our families, their advisors and tax professionals with estate and financial planning and coordinate application of any specialized services that may be required to ensure effective administration of trusts and companies
- Liaising with family offices, local and foreign banks, brokerage firms, lawyers, accountants, advisors and investment managers as may be required
- Attending relationship meetings with settlors, beneficiaries, investment professionals, lawyers and accountants
- Scheduling, compiling relevant materials, and preparing minutes of internal relationship team meetings for review
- Supporting the relationship teams, to ensure the highest level of delivery of services to our families
- Participating in Management and Administration Team meetings and draft minutes
- Ensuring compliance with all applicable laws, regulations and internal policies and procedures, including those related to the prevention of anti-money laundering
- Assisting with special projects and assist with creating solutions to streamline activities and improve efficiency
- Update the Bermuda Monetary Authority and ROC systems for changes of directors, shareholders and beneficial owners when required
- Drafting simple trustee and corporate resolutions, as well as initial review of trust deeds and company documents for accuracy
- Adhere to and provide input for improvement of internal policies and procedures

### **Qualifications, Experience and Skills:**

- Bachelor's degree in accounting, business or law
- Professional designation, ideally in finance, accounting or law i.e. CFA, CPA, LLP
- Minimum of one years' post qualification experience in professional field of study
- Three years' trust and corporate administration, banking, fiduciary duties and offshore trust and corporate law experience is preferred
- TEP and/or other relevant professional designations preferred, willingness to acquire an industry designation is required
- Ability to review Trust and Corporate documents for accuracy
- Demonstrate a basic level ability to understand trust accounting and financial statements, investments and banking principles/procedures
- Basic regulatory knowledge and experience of Anti-Money Laundering policies and guidelines
- Excellent communication (written and verbal), interpersonal, team problem solving and organizational skills
- Must be willing to work after hours and on weekends, as required.
- Exceptional work ethic and demonstrated ability to be flexible and adaptable to varying levels of complexity of work tasks
- Strong Microsoft Office skills (Outlook, Word, Excel)
- Ability to multi-task and work as a part of a team demonstrating strong organizational and time management skills with the capacity to thrive under pressure

Meritus Trust Company Limited maintains a drug-free work environment and reserves the right to perform pre-employment criminal background checks and random drug tests.

Interested applicants should apply in writing and submit two professional written references to:

Ontru: Human Resources – Meritus Trust Company Limited  
20 Church Street, 2nd Floor, Hamilton, HM 11  
Or email [hr@ontru.bm](mailto:hr@ontru.bm)

**All applications must be received no later than: December 31, 2019**