



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

Senior Trust Officer

Reporting to the Senior Fiduciary Director, the Senior Trust Officer shall 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 coordinating any specialized services 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 required
- Leading and attending relationship meetings with settlors, beneficiaries, investment professionals, lawyers and accountants
- Leading and being accountable for scheduling, reviewing relevant materials, reviewing minutes and clearing action points from internal relationship team meetings
- Leading, motivating and supporting the relationship teams, to ensure the highest level of delivery of services to our families
- Chairing and participating in management and administration team meetings and drafting minutes
- Ensuring compliance with all applicable laws, regulations and internal policies and procedures, including those related to the prevention of money laundering and assisting with the training of the team
- Identifying and pursuing opportunities for additional revenue and taking part in business development both locally and overseas
- Assisting Executive team with special projects and creating solutions to streamline activities and improve efficiency

Qualifications, Experience and Skills:

- Bachelor's degree in a related field with a minimum of 10 years' experience in trust and corporate administration, banking, fiduciary duties and offshore trust and corporate law
- TEP and/or other relevant professional designations, ideally in finance, accounting or law i.e. CFA, CPA, LLB required
- Minimum of 7 years' experience in a similar supervisory role with a proven track record of effectively leading, motivating and managing a team
- Proven ability to draft trust and corporate documents, as well as review documents for accuracy
- In-depth knowledge of Bermuda company incorporation and liquidation processes, along with Integra experience
- Demonstrates a high level of understanding trust accounting and financial statements, investments and banking principles/procedures
- Proven ability to evaluate and train junior staff
- Excellent regulatory knowledge and experience of Anti-Money Laundering policies and guidelines, and ability to assist with the training of others
- Excellent communication (written and verbal), interpersonal, problem solving and organizational skills
- Ability to multi-task and work flexibly as a part of a team demonstrating strong organizational and time management skills with the capacity to thrive under pressure
- Must be willing to undertake business travel, work after hours and on weekends, as required

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

All applications must be received no later than: February 15, 2021

