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Senior Trust & Corporate Administrator, Assistant 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 for international High Net Worth Families.

Due to on-going business growth and increasing complexity of trusts under management, the group is looking to recruit a Senior Trust & Corporate Administrator, Assistant Vice President to join the team. Reporting to the Trust Relationship Manager and operating in a business-focused environment that prides itself on operational excellence, the core responsibilities will be as follows:

Duties & Responsibilities:

- Handle trust administration for complex Trust structures (more than 1 Trust with several underlying companies, holding underlying investments in numerous jurisdictions)
- Daily administration of structures managed by LOTB including resolutions, reports, memos for files / updates, opening and maintaining bank accounts, ticklers, filing, payments, distributions etc.
- Reviewing activities on investments ensuring that transactions are properly documented
- Maintaining and updating Due Diligence, KYC information, structure charts and the Viewpoint database
- Preparation for internal and external meetings
- In conjunction with Trust Relationship Managers and/or Trust Relationship Officers, conduct any file reviews as assigned; and follow up of outstanding administration points including remediation
- Assisting with the review of information provided for new trust structures and existing trusts taken over from other trust companies ensuring compliance with local and Group directives
- Assisting with the process for the termination or transfer of trusts ensuring that all matters related thereto are addressed
- Coaching of new joiners (Trust Administrators) in the Trust and Company Administration team, as required by Trust Relationship Manager;
- Time Management
- Adhering to local and LO Group directives and procedures
- Ensure continuity of operations by providing adequate coverage of Client Registry/Custody Operations during periods of absence
- Performing any other duties requested by management. It is understood that you may be called upon to stand in for your colleagues in the case of absences and to help whenever necessary in other sections of the Company

Minimum Qualifications, Skills & Experience:

- A TEP designation or equivalent qualification is required
- Minimum of 6-7 years' experience in administering complex trust and corporate structures
- Exposure to multi-jurisdictions and tax considerations required
- Excellent communication and interpersonal skills with proven 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
- A strong analytical skillset, work ethic and deadline orientated
- 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 Suite applications, Viewpoint and Outlook
- Willingness to work extended hours is essential to cater to clients operating in different time zones
- Proven ability to exercise discretion and confidentiality

To apply please send your résumé to bdajobs@expertisegroup.com. All applications are handled in a confidential manner and in accordance with Expertise's Privacy Policy, available on our website.

Closing Date: August 29, 2022