



Continental Management Limited and affiliates (**Zobec**) provide expertise within the areas of trust, corporate and accounting services. We are seeking a **Trust Officer and Corporate Manager**. The successful applicant will be responsible for their own portfolio of clients consisting of trusts and companies, including complex private client structures and private trust companies. The individual will be required to deal with all administrative aspects of their portfolio of clients, dealing directly with clients, their advisors and family offices.

Reporting to the board of directors, key duties and responsibilities will include:

- Management and oversight of a portfolio of trusts in accordance with applicable laws, regulations, and the terms of governing instruments;
- Assisting beneficiaries/settlors/related parties and working with private client lawyers in estate planning matters including wills, estate administration, tax, conveyances, powers of attorney, purchases, stamp duty application, etc.
- Management and oversight of the provision of corporate administrative services for a portfolio of global entities in various areas including commercial real estate, healthcare, mutual funds/fund managers, insurance and reinsurance;
- Management and oversight of private trust companies;
- Acting as Company Secretary providing senior corporate administration services to clients, including liaising with clients and arranging/attending board meetings, statutory and regulatory compliance, governance, and best practice advice;
- Liaising with clients, directors, family offices, local regulatory bodies, attorneys, auditors, and accountants;
- Liaising with Zobec's compliance/risk teams to ensure we complete all compliance and risk matters to meet regulatory and internal requirements;
- Follow up and maintenance of Know Your Client and AML/ATF procedures, as well as FATCA and CRS procedures;
- Assisting in the drafting and review of corporate and trust documents and agreements ensuring statutory and regulatory compliance;
- Overseeing corporate and trust governance and best practices;
- Developing and maintaining effective client relationships;
- Building internal and external networks to promote Zobec's service offerings and raise our profile.

Education, Knowledge, skills and experience required:

- 10 + years' experience in the Bermuda private client and/or corporate industry;
- University degree in a relevant discipline;
- TEP and/or ICSA designation preferred;
- Working knowledge of residential and commercial property transfers, mortgages, wills, estates, trusts and real estate transactions;
- Working knowledge of AML/ATF laws, FATCA and CRS practices;
- Experience in monitoring changes in relevant legislation and the regulatory environment, including beneficial ownership regime;
- Working knowledge of Bermuda corporate and trust legislation;
- Proven organizational skills with the ability to manage a heavy workload with minimum supervision and meet tight deadlines in a busy environment;
- Must be willing to work after hours and on weekends, as required;
- Excellent written, oral communication and numerical skills;
- Excellent knowledge of the BMA's online registration and filing system INTEGRA and Register of Companies' portal;
- Excellent IT skills including experience with Microsoft Office suite and Viewpoint.

Interested applicants must possess a proven record of integrity and excellent work references related to the position applied for, as all references will be verified. Please submit CV and at least two (2) supporting employment references to: **HR@zobec.bm**

Closing date: 7 October 2022