



"Sofia House" 48, Church Street, 3rd floor, Hamilton, Bermuda HM 12 (441) 296-4090

Title: Trust Officer

Location: The Island of Bermuda

Hiring Firm: The Platinum Group Ltd.

Job Summary: Bermuda based company seeks Trust Officer with five years of experience in financial services (trust administration experience is also preferred) for a relocation opportunity to the island of Bermuda. This role is responsible for administration support for all aspects of the Trust administration, Company administration, and Agency arrangements.

Job Accountabilities:

- Responsible for the management and administration for a portfolio of local and offshore trusts in accordance with the terms of the relevant trust instruments, company byelaws, any prevailing legislation and the Company's internal policies and procedures
- Maximize and strengthen the client relationships with beneficiaries and advisors in order to have appropriate knowledge to carry out the trust's purposes and meet the needs of the beneficiaries
- Maintain current information on beneficiaries and their changing needs and circumstance in order to prudently carry out the firm's fiduciary duties
- Proactively organize and meet principals and beneficiaries in person to resolve their concerns while referring complex issues to management
- Analyze and interpret trust deeds and related documents with a focus on reviewing trust documents for legal, tax administrative and investment issues
- Act as a representative of the Trust company to beneficiaries, advisors and colleagues
- Maintain awareness of operational risk, takes action to limit exposure to risk and identify issues to management
- Any other reasonable duties as assigned by management

Competency Requirements:

- Bachelor's degree in finance or business or minimum five years relevant experience in financial services
- STEP designation an asset or a commitment to complete the STEP program within the first two years of employment
- Strong understanding of investments and financial services with the ability to understand and interpret trust deeds, will, byelaws and all applicable/relevant legislation guidelines relating to Trusts, Companies and Proceeds of Crime
- Good knowledge of Trust industry best practice, principles, and policies and procedures
- Good knowledge and awareness of business risks and related controls
- Ability to work under pressure and multi-task with high attention to detail

- Ability to identify potential risks both in file administration and process
- Ability to approach issues in a methodical manner and be able to communicate your findings clearly and professionally
- Ability to identify options and possible solutions to work toward the next course of action.
- Excellent interpersonal and client verbal and written communication skills
- Excellent organizational skills and ability to work on own initiative
- Proficiency in Microsoft Office Suite (Excel, Word, PowerPoint, Access)

Preferred Skills

- A thorough understanding of a company's business
- Working knowledge of corporate and securities law
- IT familiarity
- An understanding of the legal system as it affects business

Interested and qualified candidates should email resumes to careers@platinumgroup.bm

We thank all those who apply; only those selected for interviewing will be contacted