



JOB SPECIFICATION

Job Title:	Trust & Company Officer
Company	Legis Corporate Services Limited
Location:	Guernsey
Reporting to:	Trust & Company Manager
Roles Reporting to this Position:	Trust & Company Administrator/Trust & Company Senior Administrator (in some instances)

Legis Group:	<p>Legis has been providing multi-jurisdictional corporate and trust structures and supporting administrative services, to institutional and private clients for more than 30 years.</p> <p>The Legis Group companies carry on operations from the independent jurisdiction of Guernsey, Channel Islands, including administration of client entities registered in other jurisdictions.</p> <p>Legis Corporate Services Limited is the principal operating company of the group. It employs all the Legis personnel and acts as corporate secretary to client companies, providing the necessary statutory services to maintain a company in good legal standing and providing such other company administration services as are agreed with the client and the company in question.</p> <p>Legis Trust Limited is the main corporate trustee of the group. It acts as corporate trustee to private and charitable trusts established by or on behalf of clients to enable the safekeeping and preservation of assets and it provides trust administration services in respect of assets held in trust.</p> <p>Legis Fund Services Limited is the principal fund administration company of the group. It provides fund administration services, including secretarial, administrative, accounting and compliance services to funds and private equity vehicles and to fund managers in accordance with the relevant regulatory legislation.</p> <p>Legis' management and staff comprise over 60 people, many with qualifications in the accountancy, company secretarial, fiduciary services and investment fields.</p>
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Position Summary:	To take responsibility for a designated portfolio of trusts and companies and to complete all assigned tasks and processes, operating within the controls, guidelines and procedures as established by the director/associate director, including assisting/coaching team members where required.
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Specific Duties	<ul style="list-style-type: none"> ○ Have an good understanding of trust and company regulatory requirements ○ Become familiar with team’s existing allocated client portfolio ○ Ensure quality day to day service for team’s client portfolio ○ Pro-actively work with internal individuals and groups to ensure timely delivery of client data ○ Ability to resolve queries/find solutions ○ Be familiar with and adhere to Legis’ internal practices and procedures ○ Adhere to internal regulatory procedures at all times ○ Focus on chargeable time and manage own time effectively ○ Manage and record own time effectively and accurately ○ Be responsible for and effective in cash collection and control of debtors for own clients and provide guidance for administrators/senior administrators in the team ○ Understand and be pro-active in relation to client acceptance procedures and the associated risk involved ○ Be involved in the preparation of, and attendance at client meetings and follow up on action points ○ Be proficient, accurate and timely in all written communications ○ To maintain a courteous, positive and professional manner with both external and internal clients /colleagues at all times ○ Communicate effectively and concisely with clients (and other team members) by telephone and face to face ○ Take responsibility for continuing self development ○ Work on agreed training requirements and performance goals to ensure on-going development ○ Consult and escalate issues and exceptions to the Associate Director/Manager to alleviate problems or risks
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Other Requirements	<p>The incumbent will ideally have:</p> <ul style="list-style-type: none"> ○ A minimum of three years relevant experience in the trust field ○ A certificate level qualification eg: ICSA certificate or STEP Foundation ○ A commitment to a career in trust and company administration ○ Excellent written and verbal communication skills ○ The ability to use MS Word, Excel and Outlook at an intermediate level ○ A commitment to and focus on providing quality client service ○ Strong team skills and be flexible to change and the needs of the business
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	<ul style="list-style-type: none"> ○ Analytical skills and be detail orientated ○ The ability to work in a deadline/volume driven environment whilst maintaining accuracy and focus ○ The ability to drive and execute tasks and encourage others to do so ○ A willingness to learn new skills and to assist others to learn ○ The ability to prioritise and focus on the most urgent and important task. ○ Exhibited skill in planning and monitoring workloads and successful in delegating and checking work of administrators in order to achieve goals within expected timescales. ○ A proven academic record
Signing Powers:	<p>B signatory. After completion of their probationary period, Trust officers are authorised as “B” signatories, enabling them to countersign (with an “A” signatory) bank instructions up to £20,000. Trust officers may also countersign with an “A” signatory on share certificates and declarations of trust.</p>

Legis Corporate Services Limited, as the lead licensee of numerous assorted Legis Group companies, is authorised under the Protection of Investors (Bailiwick of Guernsey) Law, 1987 as amended to carry out various restricted activities.

The post holder is required to ensure to the best of his or her ability that the duties and obligations imposed by virtue of such authorisations are discharged effectively at all times.

Signed: **Date:**