



## JOB SPECIFICATION

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

Legis Group	Legis has been providing multi-jurisdictional corporate and trust structures and supporting administrative services, to institutional and private clients for over 30 years. The Legis Group companies carry on operations from the independent jurisdiction of Guernsey, Channel Islands, including administration of client entities registered in other jurisdictions.
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Position Summary:	To take responsibility for a designated portfolio of trusts and corporate structures 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"> <li>• Have an good understanding of trust and corporate regulatory requirements</li> <li>• Become familiar with team's existing allocated client portfolio</li> <li>• Ensure quality day to day service for team's client portfolio</li> </ul>
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	<ul style="list-style-type: none"> <li>• Pro-actively work with internal individuals and groups to ensure timely delivery of client data</li> <li>• Ability to resolve queries/find solutions</li> <li>• Be familiar with and adhere to Legis' internal practices and procedures</li> <li>• Adhere to internal regulatory procedures at all times</li> <li>• Focus on chargeable time and manage own time effectively</li> <li>• Manage and record own time effectively and accurately</li> <li>• 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</li> <li>• Understand and be pro-active in relation to client acceptance procedures and the associated risk involved</li> <li>• Be involved in the preparation of, and attendance at client meetings and follow up on action points</li> <li>• Be proficient, accurate and timely in all written communications</li> <li>• To maintain a courteous, positive and professional manner with both external and internal clients /colleagues at all times</li> <li>• Communicate effectively and concisely with clients (and other team members) by telephone and face to face</li> <li>• Take responsibility for continuing self development</li> <li>• Work on agreed training requirements and performance goals to ensure on-going development</li> <li>• Consult and escalate issues and exceptions to the Associate Director/Manager to alleviate problems or risks</li> </ul>
Other Requirements	<ul style="list-style-type: none"> <li>• The incumbent will ideally have:</li> <li>• A minimum of three years relevant experience in the trust field</li> <li>• A certificate level qualification eg: ICSA certificate or STEP Foundation</li> <li>• A commitment to a career in trust and company administration</li> <li>• Excellent written and verbal communication skills</li> <li>• The ability to use MS Word, Excel and Outlook at an intermediate level</li> <li>• A commitment to and focus on providing quality client service</li> <li>• Strong team skills and be flexible to change and the needs of the business</li> <li>• Analytical skills and be detail orientated</li> <li>• The ability to work in a deadline/volume driven environment whilst maintaining accuracy and focus</li> </ul>

	<ul style="list-style-type: none"> <li>• The ability to drive and execute tasks and encourage others to do so</li> <li>• A willingness to learn new skills and to assist others to learn</li> <li>• The ability to prioritise and focus on the most urgent and important task.</li> <li>• Exhibited skill in planning and monitoring workloads and successful in delegating and checking work of administrators in order to achieve goals within expected timescales.</li> <li>• A proven academic record</li> </ul>
<p><b>Signing Powers:</b></p>	<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:** .....