CITADEL
WEALTH MANAGEMENT

FIDUCIARY SPECIALIST SANDTON

REPORTING RELATION

Managing Director, Citadel Fiduciary (Pty) Ltd

PURPOSE OF JOB

To implement and administer estate planning solutions for high net worth clients, with a focus on establishing and registering, or taking over existing, trusts and assuming responsibility as a Citadel representative trustee.

KEY RELATIONS

Citadel clients and leads
Wealth Advisors
Fiduciary Assistants
Other Fiduciary Specialists

QUALIFICATION

BA or B Comm LLB or other legal qualification.
A tax qualification will be advantageous, but knowledge of taxes affecting estate planning and trusts is a minimum requirement.
CFP is an added advantage.

EXPERIENCE

Preferably an admitted attorney with 3 - 5 years' post articles current and relevant experience within the fiduciary industry.
A good knowledge of and interest in the fiduciary industry.

COMPUTER COMPETENCY REQUIREMENTS

Microsoft packages.
The ability to learn and use systems with confidence.

KPA/ STRATEGIC BUSINESS DELIVERABLES

Assume responsibility as a Citadel representative trustee and build and maintain client relationships.
Arrange and conduct client consultations, with a focus on annual trustee meetings.
Work with the Fiduciary Assistants to administer trusts in compliance with good governance and statutory requirements.
Draft trustee resolutions, Wills and other fiduciary documents.
Advise on estate planning, including the evaluation of current structures.
Prepare estate duty and other relevant fiduciary calculations.
Prepare documentation for and conduct meetings regarding the reporting of deceased estates.
Oversee general practice administration functions such as billing, debtors' management and file reviews.
Ensure that all fiduciary transactions comply with governing legislation to preclude reputational and other risks and also with the internal fiduciary service model.
Identify and action business development opportunities and enhance cross sales.
Assist with the implementation of specific projects in the fiduciary team.
Contribute to developing and refining internal procedures and policies.

COMPETENCIES	KNOWLEDGE	PERSONAL CHARACTERISTICS
• Preferably bi-lingual (English and Afrikaans) • Excellent relationship skills • Good writing and drafting skills • Strategic thinking • Good organisational skills and time management ability • Professional and confident communication skills, both verbal and written • Attention to detail and good data management • Self-driven • Ability to manage workload and meet deadlines • Ability to work in a pressurised environment and set priorities	• All aspects relating to estate planning for high net worth individuals, including Wills, deceased estates and trust administration and governance processes, locally and to some extent internationally • Keep abreast of current trends and changes in the laws affecting estate planning and the industry, locally and to some extent internationally • Fiduciary and other local compliance requirements (Master of the High Court, SARS, FICA, FAIS, FATCA, exchange control)	• Client relationship and service-orientated attitude • Dynamic, flexible and enthusiastic • Professional • Honesty, integrity, accountability and responsibility of the highest order • Highly self-motivated, focussed and proactive • Solution-driven • Pragmatic problem-solver • Detail-oriented • Respect for the confidentiality of clients' affairs • Interpersonal understanding and empathy • Capacity to work both as member of a team and independently • Intent on a career in the fiduciary industry

THE CITADEL WAY

Alignment to our clients' interests and evoke high levels of trust in both our clients and their families. Take ownership of and accountability for all aspects of your fiduciary practice.