

ROLE SPECIFICATION

Role Title	Fiduciary Specialist	Date	November 2024
Platform/Function	Alpha Family Office Services	Location	Jhb/Cape Town/Stellenbosch/Durban
Starting Date	As soon as possible	Remuneration	Market related & commensurate with experience and seniority

Primary Purpose

AlphaWealth provides investment, wealth and estate planning services to high-net-worth individuals, families, selected institutions and charities. Alpha Family Office Services (AFOS) is a division of AlphaWealth and provides estate and tax planning, trust and company administration and general advisory services to its clients.

The Fiduciary Specialist will work as an integral member of the AFOS team that provides independent trustee, trust administration, wills drafting, estate planning and tax services for high-net worth clients.

Responsibilities (See end of document for detailed breakdown of job role and responsibilities)

- ✔ Advising on and formation of new trusts
- ✔ Ensuring that all trusts comply with administrative and legal requirements (with the assistance of a Fiduciary Administrator)
- ✔ Primarily responsible for managing relationships with fiduciary clients
- ✔ Advising on and preparing draft wills
- ✔ Acting as executor in client estates (with assistance from the estate administration team)

Skills, Qualifications & Experience

- ✔ LLB degree or other relevant academic qualification (essential)
- ✔ Tax qualification will be an advantage
- ✔ Minimum 5 years' experience in the fiduciary industry
- ✔ FPSA designation or the knowledge and experience to attain such designation will be an added advantage
- ✔ Understanding of and experience in company administration will be an advantage.

Technical Competencies & Behaviors

- ✔ Strong organisational skills and attention to detail
- ✔ Excellent communication skills, both verbal and written
- ✔ Ability to work in a professional, high net worth environment
- ✔ Strong client service orientation
- ✔ Strong ability to prioritise issues, work efficiently, independently and complete actions necessary to meet requests
- ✔ Ability to relay complex information understandably
- ✔ Ability to adapt easily to a constantly changing environment
- ✔ Ability to take initiative
- ✔ Strong team orientation and ability to function as a team player
- ✔ Overall positive attitude and willingness to provide help to the entire team when needed
- ✔ Intent on a career in the fiduciary industry

Applications

For more information or to apply, please contact Kerry West-Fynn on kerry@alphawealth.co.za