

# Bourse

## JOB DESCRIPTION

Job Title: STO/Assistant Trust Manager  
Hours: 8.30 – 5.00pm Monday to Friday

### The Company

Bourse was established in Guernsey in 1999 and has developed into one of the leading trust and pension providers in Guernsey.

Our trustee services cover discretionary trusts for UK non-domiciliaries, employee benefit trusts and company management. We also provide individual and company pension administration services. We have excellent in-house capabilities and professional expertise in these continually changing environments.

We are seen as both innovative in product design and conservative in administration, whilst applying our exemplary standards of care and due diligence to all our clients.

### The role

This is a position to join our highly efficient trust department where the individual will have responsibility for the daily administration of a large portfolio of company and trust structures and will liaise closely with relationship managers, clients and intermediaries. The Assistant Manager will work closely with our Directors and Senior Trust Officers and will be responsible for ensuring all elements of their role are managed in accordance with the relevant laws and company procedure. This role will involve looking after a varied and interesting portfolio of high net worth clients

We are looking for a candidate with the following skills and experience who is already responsible for the daily and ongoing administration of a diverse portfolio of client, company and trust structures

- Qualified with industry relevant qualifications
- Comfortable working at a senior level with strong technical ability
- Possibly working at supervisory level and looking to expand on their managerial skillset

### Key responsibilities:

Tasks to include but not limited to:

- High level client care on all trust matters relating to a designated portfolio of trusts and corporate structures
- Day to day administration, management and control of administration of designated portfolio.
- Completing all scheduled investment reviews and sending for scanning and filing
- Ensuring all income and fee payments have been administered and executed correctly
- Ensuring all internal procedures have been followed
- Maintaining accurate data on all client files together with full documentation
- Adhering to internal processes and procedures ensuring all legal, ethical and regulatory requirements are understood and maintained
- Managing fiduciary relationships to ensure timely responses to clients.
- Responding effectively verbally and in writing when dealing with clients, intermediaries and related parties
- Be involved in the preparation of, and attendance at client meetings, and follow up on action points
- Maintain awareness of the regulatory environment in which we operate
- Ensure all elements of the role are managed in accordance with the relevant laws, regulatory rules and company procedure
- Keep up to date with new developments in Trust services and products and take responsibility for continuing self-development
- First sign off on administration work

The above is an overview of the role.

If you have any questions please do not hesitate to get in touch either by telephone or email and send any relevant CVs to Karen Fernyhough on [karen.fernyhough@bourse.gg](mailto:karen.fernyhough@bourse.gg)