

# Senior Trust Administrator-Wells Fargo

**JOB DESCRIPTION** - Administers the institutional non-profit and/or individual philanthropic client relationships and/or administers the client account in order to create, expand and service WMG charitable trust relationships while managing the risk of those accounts. Duties may include: Setting up, administering, terminating and distributing complex accounts of all types. May work in a team or as an individual contributor providing the general administration for a charitable trust book of assigned Investment Management and Trust accounts. Works with Investment Manager to value assets and develop investment strategy. Partners with other WMG professionals to develop and expand business. Provides analysis of client's total financial situation and offers solutions based on needs of client. Communicates directly with clients, WF Partners and Centers of Influence i.e. client's attorneys and accountants, etc. who are related to the client's accounts as part of day to day administration. Analyzes trust/financial information, reacts accordingly and re-prioritizes if appropriate. May act as lead by providing work direction to a small team of charitable trust administrators. May act as a mentor. Will partner with other WMG professionals to ensure quality administration.

**BASIC QUALIFICATIONS:** 7+ years relationship management experience.

**MINIMUM QUALIFICATIONS:**

- Excellent communication skills, both verbal and written.
- Strong organizational and time management skills.
- Strong attention to detail with ability to follow established processes and procedures.
- Strong analytical and proactive problem solving skills with complex issues.
- Strong interpersonal skills with the ability to create and sustain partnerships.
- 7+ years experience in the financial services industry, preferably charitable trust, and/or equivalent education.
- Established knowledge of trust, fiduciary law and federal regulations.
- Proficient in the use of personal computers.
- Working knowledge of all types of charitable accounts and related fiduciary, tax and service issues, including but not limited to CRTs, CLTs, CGAs, DAFs and Private Foundations.
- Ability to work independently and make timely decisions that demonstrate sound rationale, experience and judgment.
- Hands-on experience in servicing institutional non-profit and/or individual philanthropy accounts and relationships.

**PREFERRED SKILLS:**

- Bachelor's degree and graduate work.
- CFP, CTFA or similar industry designation.
- CSPG or other non-profit industry designation.
- Experience working in a team environment.
- Experience leading a team or directing the daily work of others

**FOR MORE DETAILS CONTACT:**

Mary St. John, CTFA  
Trust Team Manager  
Philanthropic Services  
Tel 562-528-3614 | Fax 562-435-0840  
<mailto:andemary@wellsfargo.com>