

## Trust Administrator

### Primary Responsibilities:

Administrative responsibility for opening new accounts in the trust department, coordinating major events during the life of a trust, and overseeing the closing of accounts.

- Coordinates opening of new trusts. Analyzes trust instrument to determine appropriate set up of new trust account. Meets with trustee to review all pertinent information and coordinates the transfer of assets. Processes receipt of new property for trusts and provides transfer instructions to Operations Manager. Provides New Trust Information Form signed by trustee to Internal Audit Supervisor. Reviews account after initial set-up, confirming completion of the process with trustee.
- Works closely with Internal Audit Supervisor to monitor major events during the life of the trust; i.e., gifts in trust, pour over trusts from estates or other trusts, splitting of trust into shares, re-valuation requirements, MPIA elections, etc. Works closely with trustees on details of the event, and coordinates implementation of any special instructions or arrangements for a trust with trust operations and tax personnel.
- Closes trust accounts and distributes assets following established policies and procedures. Coordinates distribution of securities or cash on closing. May prepare complex transactions for outgoing trusts. Reviews account before final closing on system, confirming completion of process with trustee.

### Qualifications:

- Knowledge of basic trust administration at a level normally acquired through completion of a bachelor's degree or equivalent.
- Approximately 3 to 7 years of related trust administration experience including knowledge of trusts, estates and fiduciary and individual tax requirements.

### About Hemenway & Barnes LLP

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**To Apply:** Qualified candidates may send resume and cover letter in confidence, to the [hr@hembar.com](mailto:hr@hembar.com)