

Athos Group is a highly respected boutique provider of trust and corporate services serving ultra-high net worth individuals and their families from all over the world.

Athos Group has several offices in key locations worldwide with the group head office as well as the Swiss trustee team located in Baar, Switzerland. The Trustee team consists of a small group of highly qualified and very friendly professionals.

Currently we are looking for a highly motivated junior or senior trust officer to strengthen our Trustee team.

We offer a very open, flexible and pleasant working atmosphere with many other benefits.

### **Trust officer (80% - 100%)**

A Trust Officer is responsible for the effective administration of a number of trusts and companies. On average, a TO will oversee 50 to 80 such entities on behalf of approximately 30 different clients.

#### ***Primary Responsibilities:***

- Day-to-day administration of trusts
- Handling requests from clients, bankers, asset managers, lawyers, trust managers, accounting department, others
- Administrative and client related support to Management
- Preparation of various standard documents such as Trustee and Board resolutions, Deeds of appointment, Minutes of meetings, Powers of attorney, etc.
- Assisting with client procedures (i.e. trust establishment, opening bank accounts, distributions, etc.)
- Drafting of standard agreements such as loan agreements, credit facility agreement, share purchase agreements, etc.
- Client meeting preparation, including compliance checks
- Copying, filing and scanning of documents
- Maintaining documents files, data base systems
- Timely and accurate rendition, collection and reporting of fee billings
- Ensuring the appropriate coping, scanning and filing of all original and sensitive documents according to internal procedures

#### ***Training Experience and Knowledge:***

- Sound knowledge of fundamental trust law, company law and administrative practice
- Fundamental knowledge and understanding of investment / financial instruments
- Fundamental knowledge of banking products and their application in overall management and administration of wealth
- Basic understanding and working knowledge of accounting concepts and their applications
- STEP qualification is desirable
- Degree or professional qualification in Law, Business, Accounting and related background
- Four years or more experience working in Trust, Banking, and legal related areas

***Skills and Abilities Required:***

- Ability to analyze and evaluate basic investment summaries, accounting statements, banking and banking products related documentation
- Ability to determine appropriate course of action of usual transactions, occurrences and events in accordance with general legal and administrative requirements
- Ability to identify and anticipate risks occurring in daily administration
- Ability to communicate effectively and present issues and possible solutions to the management and team colleagues
- Ability and willingness to interact, cooperate and work through issues with team members, management, and clients
- Excellent verbal and written communications skills in English. Other languages such as Russian, German, Dutch or Spanish will be added value
- Excellent MS Office knowledge (Word, PowerPoint, Excel, NavOne)
- Independent and self-starter, well organized, flexible