



## **TRUST COUNSEL**

Trust Counsel works with the Vice President of Legal Affairs to act as in-house counsel for CTC, reviewing trust agreements and other documents, drafting documents for CTC, advising CTC staff on legal matters, and working with CTC's Trust Administrators in the administration of trusts.

Trust Counsel is responsible for assuring that CTC's fiduciary responsibilities are properly discharged, that clients are served expeditiously and professionally, and that CTC's business is conducted in a manner that accomplishes the goals of CTC's clients without creating undue risk to CTC.

Trust Counsel must combine exemplary client service with diligent risk management. It is essential that Trust Counsel develop good working relationships with outside professionals, clients, and colleagues. Trust Counsel must be detail-oriented and have excellent communication skills.

### **EDUCATIONAL BACKGROUND & EXPERIENCE:**

- JD from an accredited law school; LLM in Taxation preferred.
- Licensed to practice law and in good standing in any state or the District of Columbia.
- Must have excellent communications skills and be able to multi-task and work independently.
- Minimum of two to five years' experience in a trust company, a bank trust department, or a trusts and estates group (or related area of practice) of a law firm.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES (including but not limited to):**

- Work closely with clients' attorneys and other advisors in the drafting of trusts and other legal documents, working collaboratively to ensure that trust accounts accepted by CTC are governed by documents that adhere to CTC's standards
- Review other documents, including partnership agreements and LLC operating agreements, with a view towards whether they are acceptable to CTC
- Draft release agreements and other documents relating to the opening, administration and closing of trust accounts
- Prepare Trust Summaries
- Review Distribution Memos and Funds Transfer Forms, and work with Trust Administrators to ensure that CTC has received and analyzed all information and documentation necessary for CTC to make an informed decision regarding making transfers of assets from trust accounts
- Review all documents that are for the signature of CTC's Authorized Signers
- Assist in the representation of CTC with regard to any pending litigation
- Adhere to all of CTC's policies and procedures and ensure that support personnel also do so
- Such other duties as may be assigned by the Vice President of Legal Affairs