

DEPARTMENT: LEGAL
JOB TITLE TRUST COUNSEL
REPORTING: CHIEF FIDUCIARY OFFICER

RESPONSIBILITIES:

PLANNING: Provide estate and wealth planning advice for clients in collaboration with clients' outside estate planning counsel and Fiduciary Trust's investment officers. Review existing estate plans, summarize these plans for clients and identify issues requiring revisions and updates, prepare tax and other illustrative calculations as deemed appropriate, coordinate document preparation with outside counsel, review drafts, and assist at the signing stage. Advise and assist clients in communicating aspects of their estate planning to next generation family members. Coordinate the preparation of and review related gift tax returns.

ESTATE ADMINISTRATION: Supervise and be primarily responsible for all duties of the personal representative in connection with estates where Fiduciary Trust serves as personal representative or agent for personal representative. Attorney will supervise and work closely with paralegals in carrying out these duties. Working with in-house tax preparers, Attorney will also be responsible for state and federal estate tax preparation and filing.

FIDUCIARY LAWS: Provide advice to Fiduciary Trust's investment officers and employees on all matters related to fiduciary laws and trust administration. Examples include interpreting trust distribution standards and other provisions, trustee duties, non-judicial settlement agreements, trust decanting, fiduciary common laws, states statutes, etc.

TAX LAWS: Advise clients, Fiduciary Trust investment officers, and other employees on estate, gift, generation-skipping, fiduciary income and individual income taxes, and various state tax issues.

LITIGATION: Manage court actions involving trust and estate matters. Management will include engaging and overseeing outside counsel for each matter. Court actions include, trust reformations, trustee appointments, allowance of accounts, etc.

MARKETING AND THOUGHT LEADERSHIP: Attorney will participate in new business and prospect meetings, representing the Fiduciary's estate, trust and tax planning depth and expertise. Attorney will also be required to contribute to thought leadership initiatives writing articles, white papers, other content, and speaking on fiduciary, planning and tax matters.

TRAINING AND EDUCATION: Provide training and education for Fiduciary Trust investment officers and employees on various fiduciary, planning and tax matters, as well as changes in the law and current events affecting trusts and estates.

QUALIFICATIONS:

MEMBER OF THE MASSACHUSETTS BAR

EXCELLENT ANALYTICAL AND COMMUNICATION SKILLS AND SOUND,
PRAGMATIC JUDGEMENT

ENERGETIC, COLLABORATIVE AND ENTHUSIASTIC WORKING STYLE COMBINED
WITH A GENUINE EMPATHY FOR EXTERNAL AND INTERNAL CLIENTS

CAREER TRACK RECORD DEMONSTRATING ACHIEVEMENT AND A MINIMUM OF
THREE YEARS' WORKING WITH HIGH NET WORTH CLIENTS

STRONG LAW SCHOOL AND UNDERGRADUATE ACADEMIC RECORD

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01/2017