



# Trust Administrator

BCR Fiduciary Services Ltd

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|---------------------|------------------------------------------------------------|
| <b>Business</b>     | BCR Fiduciary Services Ltd                                 |
| <b>Location</b>     | Jersey                                                     |
| <b>Reporting to</b> | Senior Trust Administrator or designated manager           |
| <b>Employment</b>   | Full time                                                  |
| <b>Role focus</b>   | Client administration, record keeping and service delivery |

## About BCR Fid and the opportunity

BCR Fid is a new boutique Jersey trust company. Our systems, procedures and templates are designed and in place, and the person who joins us now will help refine and improve them as we grow, rather than simply working to them.

We are wholly owned by Jersey-resident owners who work in the business every day. There is no distant parent company and no offshore shareholder to satisfy: decisions are taken locally, quickly and by the same people you will sit alongside. That gives the role unusual visibility and unusual influence.

For the right person this is a genuine opportunity to come in at the start. You will be close to clients and to the owners from the outset, you will see the whole of a structure rather than a narrow slice of it, and your ideas on process, technology and client service will be heard and acted on. As the business grows, so will the role and the responsibilities available to those who have helped it grow.

## Purpose of the role

The Trust Administrator will provide accurate, timely and thoughtful administration for a portfolio of trusts, companies and other fiduciary structures. Working under appropriate supervision, the role holder will support client relationships, maintain high-quality records and help ensure that all activity is completed in line with client instructions, internal procedures and Jersey regulatory requirements. Because we are a new and deliberately small firm, the role also carries real scope to help refine and improve our established procedures, templates and systems as the business grows.

## Key responsibilities

- Provide day-to-day administration for trusts, companies and other fiduciary structures, escalating complex or unusual matters promptly.
- Prepare routine correspondence, trustee and company minutes, written resolutions, payment instructions, statutory forms and supporting documents for review.

- Maintain complete and accurate client, entity and statutory records, including registers, ownership information, diary dates and document filing.
- Process payments, receipts, invoices and basic bookkeeping information accurately, ensuring that appropriate authority and supporting evidence are in place.
- Assist with client take-on, periodic reviews and changes in circumstances, including obtaining and recording customer due diligence, source of funds and source of wealth information.
- Support transaction monitoring and sanctions, PEP and adverse-media screening, referring concerns or inconsistencies in accordance with internal procedures.
- Monitor deadlines, action points and outstanding information, following up courteously with clients, advisers and colleagues.
- Liaise professionally with clients, beneficiaries, banks, investment managers, accountants, lawyers and other service providers.
- Assist with preparation of information for accounts, tax returns, audits, regulatory submissions and internal reporting.
- Record time and matter activity promptly and accurately, and contribute to efficient billing and debt collection processes.
- Contribute ideas to improve templates, workflows, controls and the overall client experience as BCR Fid grows.

## Risk compliance and conduct

- Follow BCR Fid policies and procedures and the applicable Jersey legal and regulatory framework, including the TCB Codes and AML CFT CPF requirements.
- Apply a questioning mindset and raise errors, complaints, conflicts, data incidents, suspicious activity and other concerns without delay.
- Do not act or release funds without the required authority, documentation, risk assessment and approval.
- Complete required learning and maintain sufficient knowledge of assigned structures and their purpose.

## Experience knowledge and qualifications

| Essential                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Desirable                                                                                                                                                                                                                                                                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Relevant experience in trust, corporate, legal, banking or professional-services administration.</li> <li>• Strong accuracy, organisation and written communication skills.</li> <li>• Ability to manage competing deadlines and follow matters through to completion.</li> <li>• Sound judgement, discretion and commitment to confidentiality.</li> <li>• Comfortable using Microsoft 365 and willing to learn specialist administration systems.</li> </ul> | <ul style="list-style-type: none"> <li>• Previous Jersey trust or company administration experience.</li> <li>• Working knowledge of Jersey companies, trusts and AML requirements.</li> <li>• A relevant qualification or active study towards STEP, CGI, ICSA or an equivalent professional award.</li> </ul> |

## Personal qualities

- Warm, professional and responsive, with a genuine interest in clients and their circumstances.
- Careful and dependable, while willing to ask questions and learn.
- Collaborative and respectful, with a practical approach to solving problems.
- Commercially aware and motivated to deliver work efficiently and to a high standard.
- Energised by the idea of joining a new business early, comfortable with change and committed to continual improvement.

## Working at BCR Fid

BCR Fid is a boutique, owner-managed Jersey fiduciary business combining technical excellence with personal, responsive service. Our owners are Jersey residents who work in the business day to day, so the team is small, the reporting lines are short and good work is seen rather than reported upwards.

We have deliberately built something different: a firm where administrators understand the whole of a client's affairs, where technology is used properly rather than tolerated, and where the person doing the work has a say in how it is done. Joining at this stage means helping to raise those standards, not simply working to them.

The role holder will be expected to contribute positively to a growing business, work collaboratively across the wider BCR Group and uphold our values of Excellence, Delivery, Respect and Elegance.

*This job specification describes the principal responsibilities of the role. It is not exhaustive and may evolve as the business develops, subject to the role holder's skills, experience and appropriate support.*