

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - TRUST MANAGER				
Sector	Financial Services			
Track	Product Solutioning and Management			
Occupation	Trust Administrator			
Job Role	Trust Manager			
Job Role Description	<p>The Trust Manager is responsible for building relationships with clients to meet their personalised needs. He/She is responsible for client onboarding and documentation to ensure accuracy. He also develops policies to mitigate risks and align with compliance requirements. He engages with external providers when necessary to achieve client objectives.</p> <p>The Trust Manager is able to work independently and has good time management skills. He has a strong attention to details and is able to manage multiple priorities. He possesses strong interpersonal and communication skills to deal with clients. He is able to react quickly when faced with adversity, and is adept at resolving ad-hoc situations and responding to changes in relevant regulatory areas.</p>			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Assist in client onboarding processes	Review client documentation prior to acceptance to ensure compliance with regulatory guidelines	
			Perform due diligence on new clients	
			Review supporting information and provide recommendations for client acceptance	
			Conduct reviews of client acceptance guidelines	
			Interpret and review all trust documentation to ensure completeness and accuracy for distributions	
	Provide on-going support	Interpret client needs, risk appetites and objectives		
		Review client records and accounts for inaccuracies or anomalies		
		Ensure timely resolution of clients' requests and communicate with relevant internal departments involved in client service delivery		
		Analyse client needs and provide recommendations		
		Develop long term relationships with clients by understanding client needs and complexities		
		Manage engagement of external service professionals		
	Ensure compliance with organisation's policies and legal and regulatory requirements	Analyse identified risks and compliance exposure internally for both the organisation and clients and provide recommendations		
		Develop control systems to mitigate risks and compliance exposure		
		Apply knowledge of due diligence regulations and legislative changes to mitigate risks		
		Analyse regulatory guidelines and industry risks trends and developments to understand the implications for the organisation and for clients		
Analyse trust terms to determine circumstances where trusts can be varied, revoked and terminated				
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Corporate and Business Law Application	Level 4	Communication	Advanced
	Customer Acceptance Checking and Onboarding	Level 3	Service Orientation	Intermediate
	Customer Experience Management	Level 4	Teamwork	Intermediate
	Ethical Culture	Level 4	Problem Solving	Intermediate
	Market Specialisation	Level 4	Interpersonal Skills	Advanced
	People Performance Management	Level 4		
	Regulatory Compliance	Level 3		
	Risk Management	Level 3		
	Service Challenges	Level 4		
	Stakeholder Management	Level 4		

	Strategy Planning	Level 5		
	Trust Structuring	Level 4		
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services			

The information contained in this document serves as a guide.