## **About the job**

Fiduciary Trust International is a wealth management firm founded in 1931 by families for families, with a singular focus on growing and protecting our clients’ wealth through generations. We work closely with individuals, families and foundations to build and manage personalized investment portfolios, and to develop estate plans that extend wealth to future generations. And, we are part of Franklin Templeton, a global investment leader. That means we can combine a personalized experience with access to sophisticated research and investment solutions.

Fiduciary Trust International’s Radnor, PA office, approximately 30 minutes outside of Philadelphia, is hiring a Trust Counsel to join our office of 60 investment and trust professionals.

**Core Responsibilities

Deepening Client Relationships:**

* Provide clients with holistic review of estate and wealth transfer plans working in collaboration with relationship teams and outside professional advisors
* Collaborate and coordinate with market teams and nationally in order to provide clients with breadth of firm’s offerings
* Responsible for some client relationships as a core partner, leading with advice and providing guidance as clients’ planning needs evolve and change
* Understand and update team and clients regarding changes to federal, state and local estate, gift and income tax laws and proactively identify impact to client plans

**Supporting Trust Administration**

* Provide guidance to trust team members on all aspects of estate and trust administration, including administration of special needs trusts and guardianships
* Collaborate with Head of Trust Administration concerning implementation of policies and procedures
* Review intake of new trust business and related documents in accordance with trust acceptance procedures
* Provide advice concerning trust terminations, accountings, decantings and use of nonjudicial settlement agreements
* Review exercises of discretion, including distributions of principal and income
* Work with relationship teams to address questions from co-trustees and beneficiaries
* Refer questions to outside counsel, as necessary

**Community Involvement/Marketing And Sales**

Actively represent the firm in the community through thought leadership and participation in industry groups such as bar associations, committees, networking groups and conferences

* Assist and participate in new business meetings in order to articulate value proposition of integrated wealth management from Trust Counsel perspective
* Act as a leader and SME for specific new projects and initiatives related to new business development and client retention

**Ideal Qualifications**

* JD or LLM required; additional law degree or MBA preferred
* Bar admission in relevant states required
* 10+ years trust and planning experience in a legal or professional environment
* Working knowledge of generally accepted business procedures, practices and regulations
* Knowledge of state-specific Trust laws, including Pennsylvania, New Jersey, Delaware, and other jurisdictions, preferred
* Network of other professional advisor relationships to leverage and collaborate with
* Fluency across financial planning disciplines, including cash-flow planning, insurance and risk management, income tax planning and investment planning, preferred
* Ability to perform multiple tasks in a fast paced, team environment
* Ability to interact with and present to senior management and clients on a regular basis
* Excellent verbal and written communication skills
* Excellent organizational skills and strong attention to detail

Interested candidates can contact John Hill via email: John.Hill@fiduciarytrust.com or selecting the link below.

<https://www.linkedin.com/jobs/view/3574230527>

**What makes Franklin Templeton unique?**In addition to the dynamic and professional environment at Franklin Templeton, we strive to ensure that our employees have access to a competitive and valuable set of Total Rewards—the mix of both monetary and non-monetary rewards provided to you in recognition for your time, talents, efforts, and results.

**Highlights Of Our Benefits Include**

* Three weeks paid time off the first year
* Medical, dental and vision insurance
* 401(k) Retirement Plan with 85% company match on your pre-tax and/or Roth contributions, up to the IRS limits
* Employee Stock Investment Program
* Tuition Assistance Program
* Purchase of company funds with no sales charge
* Onsite fitness center and recreation center\*
* Onsite cafeteria\*

\*Only applicable at certain locations

# We believe that being a good corporate citizen is good business. To us, corporate citizenship means being accountable, serving our clients, being an employer of choice, managing our environmental impact, and supporting our communities. An emphasis on corporate citizenship is embedded in our culture and values, and is an important element of how we achieve success.We are also committed to your learning and development with resources focused around Experience, Exposure, and Education, to help you achieve your professional development goals.Franklin Templeton is an Equal Opportunity Employer. We are committed to equal employment opportunity for all applicants and existing employees and we evaluate qualified applicants without regard to ancestry, age, color, disability, genetic information, gender, gender identity, or gender expression, marital status, medical condition, military or veteran status, national origin, race, religion, sex, sexual orientation, and any other basis protected by federal, state, or local law, ordinance, or regulation. We invite you to visit us at Franklin Templeton Careers to learn more about our company, career opportunities and recruitment process.Franklin Templeton is committed to fostering a diverse and inclusive environment. If you believe that you need an accommodation to search for, or apply for, one of our positions please send an email to accommodations@FranklinTempleton.com . In your email, please include the accommodation you are requesting and the job title and job number you are applying for. It may take up to three business days to receive a response to your request. Please note that only requests for accommodations will receive a response.