


## Job Description

**Job:** Trust Business Development Administrator
**Primary Location**: US - Wilmington, DE
**Schedule:** Full-time (40 hours per week)

First State Trust Company ("FSTC") is a Delaware chartered trust company in Wilmington, Delaware. Since 1982, FSTC has been providing corporate trust, custody, and administration services to trust clients. Formerly known as Citi Institutional Trust Company and dating back to its roots as E.F. Hutton Trust Company, FSTC has concentrated its focus on strategic alliances with world-class financial service firms. Our strategic alliances allow clients to take advantage of FSTC's independent professional trust administration services, combined with the investment management services of their chosen provider.

### Position Responsibilities

The FSTC Business Development Administrator position is responsible for assisting with the sales and marketing efforts at FSTC for Personal and Institutional Trust business lines. This position reports to the Managing Director, National Sales Manager ("Sales").

This role is responsible for assisting the Sales team with cultivating and building relationships with financial advisors and promoting FSTC corporate trustee and administration services for personal and institutional trusts. This individual is the internal sales representative for the firm. This individual is also responsible for the onboarding of all new relationships, including: preparation of paperwork, customer identification procedures, preparing for new business committee approval, and other documentation related to bringing on new business for FSTC. Responsibilities include:

- Work with the Sales team with cultivating new business relationships and servicing Alliance Partner Trust Specialists and Financial Advisors
- Assist with developing marketing materials, branch/client presentations and packages, and RFP submissions
- Work with Financial Advisors and clients with questions and concerns and with completing new account paperwork and compiling all required documentation
- Oversee the preparation of new account documentation and on-boarding; Effectively handle the entire transition from paperwork, follow-up, approval, and on-boarding
- Work with the Trust Officer to prepare them for the engagement
- Organize/prepare all new relationships for the FSTC New Business Committee Meeting approval meeting
- Prepare internal sales and metrics reporting; Prepare external sales reporting for Alliance Partnership firms
- Maintain and periodically update all FSTC external website and partner marketing materials




- Accept special projects to improve efficiencies, support the success of FSTC, and enhance overall customer experience
- Communicating with clients, financial advisors and other trust entities as needed
- Understand and adhere to all department policies and procedures (and those of our Alliance Partner firms), including fiduciary & regulatory requirements to minimize FSTC and client risks

**Knowledge & Qualifications**

- Minimum 3 years of experience in Trust Services sales, relationship management or administration (please do not apply if you do not have trust administration or trust sales experience; trust administration experience preferred)
- In-depth knowledge of types of institutional and personal trusts is vital
- Undergraduate degree is required
- Candidates must have excellent communication and presentation skills, negotiate well, show strong initiative and accountability, and ability to work well independently in a goal-oriented environment
- Excellent verbal and written communication skills required
- This role requires a self-starter who is extremely detail-oriented and works well in a very fast paced environment