



**ROLE NAME & GRADE:** Trust Administrator  
**REPORTS TO:** WAY Trustees Trust Operations Manager

**Main Purpose of Role**

To provide a professional, flexible, and high-level administrative service to our Trust clients.

**Responsibilities of incumbent:**

Be fully conversant and up to date with the operational aspects of WAY Trustees offering and general trust administration requirements.

Ensure that WAY Trusts are administered correctly:

- Process new trust applications, liaising with internal & external investment partners administering the underlying investments.
- Provide ongoing support to customers and advisers throughout the lifetime of the trusts.
- Preparing accurate plan anniversary documentation within agreed timescales and distributing to customers and advisers.
- Assist Trustees and their advisers in fulfilling the ongoing responsibilities associated with the trusts by responding to telephone or email enquiries.
- Processing returned anniversary documentation, instructing transactions at the appropriate times and monitoring progress to settlement.
- Updating plan database to reflect plan and investment transactions.
- Work closely with WAY's Regional Sales Managers and external investment service providers

**Suitable Candidates will have:**

- Previous experience in an administration role within the financial, legal or accountancy sectors
- Attention to detail and accuracy is essential
- Excellent communication skills both orally and in writing with excellent interpersonal skills
- Ability to process and absorb information quickly
- Attention to detail and high standards of quality
- Excellent organisational ability, prioritises work and sets realistic timescales

This is a full-time permanent job which is office-based, working 9am to 5pm Monday to Friday.

**Benefits include:**

- Free on-site parking
- Company pension scheme
- Flexible and remote working opportunities
- Staff activities