

JOB OPENING
TRUST MANAGER (80-100%)

VALUEworks is an independent Multi-Family Office based in Zurich, Switzerland. We provide holistic and highly personalised services to a global clientele of entrepreneurial families. We specialise in international wealth advisory and management, strategic investment services, next-generation education, family governance and philanthropy. As a forward-thinking firm, we have made a commitment to go beyond traditional wealth and estate planning to focus on preserving wealth alongside family values, and financial security alongside social responsibility.

VALUEworks is seeking a Trust Manager for its Wealth Management Team. A successful candidate should have:

- at least five (5) years of professional experience in the wealth management, family office or fiduciary industry, particularly in dealing with the needs of affluent international families
- solid experience in the management of complex wealth-holding structures, including trust and company structures, and of charitable entities such as Swiss foundations
- general understanding of international tax, regulatory and compliance issues as well as financial, investment and insurance matters
- a university degree in law, taxation, business or finance or an equivalent education
- a STEP Diploma in International Trust Management, or a similar professional qualification
- solid project management, coordination and organisational skills
- open-mindedness, flexibility and strong client service orientation
- excellent German and English language skills.

The Senior Trust Manager's **main responsibilities** include:

- setting up and hands-on management of international wealth-holding structures and charitable foundations
- oversight of legal, tax, compliance and reporting matters in cooperation with compliance and external specialists, including file reviews and deadline management
- handling of client relationships and dealing with requests from family members, including tailor-made projects, transactions and lifestyle requests
- close collaboration with the compliance, client support, accounting and investment consulting teams.

We offer an opportunity for a long-term career in the private client sector, in a dynamic, entrepreneurial and fulfilling working environment that is full of variety and open to new ideas and innovation.

Applicants are invited to submit their CV, together with a motivation letter by post or by email to Valerie Jenni, COO, at talent@valueworks.ch. For further information, please call +41 44 388 9000 or visit us on www.valueworks.ch.