



Vice President, Client Advisor Position Profile

THE COMPANY

Whittier Trust Company and The Whittier Trust Company of Nevada, Inc. (collectively “Whittier Trust”) are, respectively, California and Nevada state-chartered trust companies with over 125 wealth management professionals and offices in South Pasadena, San Francisco, Reno and Seattle. Whittier Trust provides fiduciary, investment management, philanthropic and family office services to high net worth individuals and families, and their related trusts, foundations and other entities. Viewed collectively, Whittier Trust is the largest “multi-family office” headquartered on the West Coast and manages and consults on more than \$9 billion in assets for 270 different families with an average account size of nearly \$35 million.

For more information, please visit www.whittiertrust.com.

POSITION SUMMARY

The candidate will be a key member of the team responsible for growing and expanding the awareness of Whittier Trust’s high touch service delivery model in the Western region and nationally. The successful candidate will be a seasoned relationship executive or trust officer with a proven business development track record who aligns well with the firm’s culture. Whittier Trust’s culture is one that is performance/accountability driven, client focused, family oriented and supports the long term career satisfaction of its employees. All of this is reflected in Whittier Trust’s unusually low employee turnover rate.

This is a trust officer/relationship management position for high net worth clients. It involves extensive client contact and a working knowledge of trust and agency account administration including fiduciary accounting, securities, finance, real estate, taxes and estate planning. A high

priority goal for this position is the development of new business. This is accomplished by working independently, as well as with staff across the organization, through professional networking and direct solicitation of qualified prospects. The officer should have a strong established network of legal, accounting and other professionals, as well as client prospects. The officer has an assistant and together has total administrative responsibility for a book of accounts, and shares relationship management with an assigned investment officer. The job also requires the ability for occasional travel to call on active clients, referral sources and prospective clients.

PRIMARY RESPONSIBILITIES

- The position requires a working knowledge of legal documents encountered in trusts, estate planning and finance, including trust agreements, deeds, powers of appointment, powers of attorney, stock powers, assignments, disclaimers and partnership agreements.
- The position requires a working knowledge the legal requirements that effect trusts under the Principal & Income Act and Prudent Investor Act, and community and separate property issues.
- Call on network contacts and prospects regarding the development of new business for the firm. Achieving calling and new business revenue goals is an essential part of the job and is a top priority.
- Coordinate closely with other company departments (tax, insurance, operations, real estate, investment and foundations) regarding client matters. Effective communication skills are essential.
- Participate with the investment officer in client meetings.
- Coordinate with the investment department in the scheduling of clients' investment performance reviews and monitoring of investment trades.
- Supervise and instruct others in the processes of opening accounts and closing accounts, transferring and distributing assets, drafting correspondence to clients, clients' family, agents and professional advisors.
- Coordinate with operations and tax departments to provide clients or their professionals with appropriate information required for tax filings and the maintenance of accounting records.
- Complete forms, prepare internal documentation and present periodic account reviews.
- Participation in other internal committees or task forces, such as Client Services or Marketing.
- Provide extensive personal service to clients as required.
- Additional tasks as assigned.

DESIRED CANDIDATE

- Bachelor's degree from an accredited university coupled with a related certificate is desired (i.e., CTFA).
- Advanced degree preferred (i.e., MBA or JD) and CFA, CFP, CPA also beneficial.
- Minimum ten years' experience in a similar role with a successful track record in new business development.
- Superior ability to identify and build relationships with qualified prospects.
- Established network of legal, accounting and insurance professionals in the area and surrounding communities.
- Background in wealth management, client administration, portfolio management and/or foundation services.

PERSONAL CHARACTERISTICS

- Strong people skills.
- Extraordinary sales skills.
- Outstanding marketing and presentation skills.
- Fanatical client service focus.
- Effective verbal and written communication skills.
- High integrity with a diligent work ethic.
- Team/people oriented.
- Highly organized with good time management skills.
- Meticulous attention to detail.
- Valid driver's license and the ability to travel by airplane.

COMPENSATION

A competitive base salary, performance bonus, sales incentives, restricted stock, profit sharing, and benefit plans including medical, dental, vision, life and accidental death & dismemberment, executive medical plan, long term disability, 401k or Roth with 25% match on first 6% of base compensation are offered.

Resumes and corresponding documentation may be submitted confidentially to hrdept@whittiertrust.com.