

**Private Client Fiduciary Advisor  
Wilmington Trust  
Buffalo, NY**

**BASIC FUNCTION:**

Responsible for managing fiduciary client relationships. Responsible for assessing and managing risk; the appropriate exercise of fiduciary discretion and judgment; and adherence to policies and procedures related to account administrative activities. Acts as a key consultant to clients, developing and implementing solutions. Anticipates and identifies opportunities to create new relationships and expand existing relationships through cross selling of trust and other bank products.

**POSITION RESPONSIBILITIES:**

**-Relationship Management:**

Manages fiduciary client relationships. Administers accounts through demonstrated proficiency and sound judgment in exercising fiduciary discretion. May serve as the primary point of contact for the client or as a member of a dedicated team.

Implements policies and procedures related to fiduciary and account administrative matters. Monitors account openings, asset fundings, distributions and terminations. Assumes responsibility for overall client satisfaction. Maintains comprehensive knowledge of, and coordinates the efforts of, appropriate bank resources to ensure timely delivery of quality service and expand client relationships.

Cultivates strong working relationships with clients and their advisors in order to develop a complete understanding of clients' needs. Effectively communicates client needs and concerns to partners.

Adds value to relationships by solving existing issues, pro-actively anticipating issues and taking preventive action. Educates client on bank products and services, emerging issues, and regulatory/tax changes. Advises client or appropriate team member of applicable solutions.

Identifies new business prospects and expands current relationships by cross selling bank products and services and participates in the development of new solutions to client needs.

Participate in the coordination of client presentations, bringing in additional experts as needed.

Keeps abreast of current trends and changes in trusts and estates and tax and fiduciary law.

Complies with all bank policies and procedures.

**-Interaction With Internal/External Partners:**

Develop strong working relationships with administrative support areas, i.e. Tax, Legal, Operations, etc.

Acts as a fiduciary resource to Private Client Advisors, Financial Consultants and other internal partners.

Assists in new business development efforts with regional team and internal partners (e.g. Private Client Advisors, Financial Consultants, Investment Advisors, Relationship Managers, Private Bankers, Regional Insurance Coordinators, Centers of Influence, other business lines and support staff).

**-Investment In Self:**

Obtain professional designations such as CFP and CTFA and maintain designations through required continuing education.

Pursue degree programs, continuing education and training.

Participates in community and civic activities in an active leadership role.

**-Other Responsibilities:**

Works effectively within a team environment, and reacts to change in a positive and productive manner.

Maintain positive working relationships.

Maintain highest levels of integrity and professionalism.

**NATURE AND SCOPE:**

Ability to communicate internally with bank management and executives and externally with clients, their representatives, accounting firms, other investment brokers, attorneys, CPAs, and tax accountants, etc.

**BASIC QUALIFICATIONS:**

Bachelors' degree or equivalent training and/or work experience.

Minimum 1 year of experience independently administering fiduciary accounts or demonstrated fiduciary expertise, in a related capacity or as a part of a team, or related legal\business experience in the financial industry.

Demonstrated strong oral, written and presentation communication skills.

Strong customer focus.

Demonstrated ability to attract, expand and retain client relationships including building a significant level of trust with clients.

Ability to work as a team member.

General computer knowledge.

Some travel may be required.

**PREFERRED QUALIFICATIONS:**

CTFA preferred

JD preferred

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