

Job Title: Director of Estate Planning and Fiduciary Services

Location: Mechanicsburg, PA (In person)

About Us:

LeTort Trust is a Private Trust Company providing full service retirement plan design and management for closely held businesses and multi generation family wealth planning. Our objective is to provide coordinated estate planning, financial, and fiduciary services, integrating a family office model with personalized solutions. We seek a Director of Estate Planning and Fiduciary Services to enhance our team, with a focus on innovative legal consultation, collaboration, and service excellence.

Job Description:

The Director of Trust and Estate Planning will offer strategic planning and consultation on estate planning and trust administration, will spearhead the enhancement of our fiduciary services, and will manage the engagement of outside counsel for specialized legal matters. This leadership role requires a proactive, knowledgeable individual who can effectively navigate complex estate planning scenarios, foster a family office-like client experience, and ensure access to and collaboration with top-tier legal expertise.

Key Responsibilities:

- Lead estate planning and trust administration, providing expert advice and innovative solutions.
- Drive the development and refinement of fiduciary services to embody a comprehensive, client-centered approach.
- Strategically engage and oversee outside counsel for ERISA and general corporate law matters, ensuring the highest legal standards and compliance.
- Collaborate with internal teams and external advisors to deliver multidisciplinary client solutions.
- Stay informed on legal and industry trends to maintain the competitiveness and compliance of our services.

Qualifications:

- Juris Doctor (JD) with current licensure in Pennsylvania.
- Proven experience in estate planning and trust law, with a preference for candidates familiar with ERISA and corporate law.
- Demonstrated ability to manage external legal relationships and resources.
- Excellent leadership, analytical, and communication skills.

Why Join Us:

LeTort Trust offers a dynamic, supportive environment where innovation and professionalism are valued. We provide competitive compensation, professional growth opportunities, a rich benefit package, and the chance to significantly impact our clients' financial and legacy planning.

How to Apply:

Submit your resume and cover letter to letort@letorttrust.com with "Director of Estate Planning and Fiduciary Services" in the subject line.

LeTort Trust was formed as an Independent Trust Company to create a highly specialized wealth management firm combining the investment resources of a large firm, with the highly personalized service found in a boutique wealth management company. LeTort Trust has been serving the central PA market since 2002, providing business owners, executives and individuals with a wealth of experience in the retirement plan services, investment management and personal trust industries. For further information on LeTort Trust, please visit our website at www.letorttrust.com.

LeTort Trust is an Equal Opportunity Employer and considers all qualified applicants regardless of race, gender, color, religion, national origin, age, sexual orientation, gender identity, disability, veteran status or other classification protected by law.