

Director Attorney-in-Fact

Do you have experience working with senior citizens? Are you comfortable with and understand the roles of an Attorney-in-Fact for finance or health as designated through a Durable Power of Attorney document? Are you looking for a flexible full-time schedule? WE Trust Company has an opening for a Director of Attorney-in-Fact who will work with our team, both leadership and direct reports, to manage and support the Attorney-in-Fact Department. The ideal candidate must be honest, thorough, attentive, a team builder and deeply dedicated to their work.

Day-to-Day Responsibilities:

- Read, interpret and implement Attorney-in-Fact documents including DPOA, living will.
- Work with independent investment advisors to ensure compliance with investment policy statements for DPOA outlining fiduciary responsibilities.
- Interpret financial reports and conduct annual reviews with investment advisors.
- Collaborate with team on medical decisions, care management and end-of-life needs.
- Document in detail all Attorney-in-Fact activity and decisions.
- Supervise team including associates and senior associates as they work on day-to-day Attorney-in-Fact administration.
- Report to Chief Operating Officer.

You will have:

- 4+ years' experience in client services and working directly with senior/aging community.
- Bachelor's Degree. MSW, CSA, CMC, CFP or CTFA are desirable.
- Knowledge and familiarity with fiduciary duties, financial assets, cognitive or physical impairments.
- High EQ, compassionate and composed under pressure with a strong ability to read, interpret and execute legal documents with precision.
- Ability to operate "by the book" while also being a creative problem solver and communicator.
- Strong boundaries coupled with caring bedside manner and excellent advocacy skills.

You will receive:

- Compensation: \$125k to \$150k base salary, DOE
- Flexible Schedule
- Health care-75% paid premiums for employees
- Disability and Life Insurance
- PTO
- Simple IRA with 3% company match
- Continuing Education Benefit
- Cell Phone Stipend
- Excellent caring culture—professional, yet casual

WE Trust is an equal opportunity employer and does not unlawfully discriminate against employees or applicants for employment based on an individual's race, color, religion, creed, sex, national origin, age, disability, marital status, veteran status or any other status protected by applicable law.

Submit your resume for consideration to contact@wetrustco.com.