Hawthorn Senior Fiduciary Advisor

At PNC, our people are our greatest differentiator and competitive advantage in the markets we serve. We are all united in delivering the best experience for our clients. As a **Senior Fiduciary Advisor** within **Hawthorn, PNC Family Wealth**, you will be based in **Cleveland, Ohio.**

- Engages in fiduciary decision-making by executing the terms of any plan or document in which PNC serves as trustee, guardian or agent. Administers the most complex fiduciary accounts and sensitive high-profile relationships. Ensures compliance with all legal and fiduciary regulations, policies and procedures. Possesses an in-depth understanding of how types of trusts operate individually and together to or for the benefit of clients in family relationships.
- Delivers the full breadth of the fiduciary platform in order to grow the fiduciary business and assure the highest level of client experience. Administers assigned accounts in accordance with documents, state law, policy and procedure.
- Handles risk management and the resolution of legal and compliance-related issues for assigned accounts. Communicates with clients, solves problems and escalates anticipated or known client issues/concerns.
- Maintains and grows assets under management by working with clients, beneficiaries and gatekeepers. Meets with clients both on and off bank premises. Identifies other bank products and services as sales opportunities. Prospects for new clients by asking for referrals from existing clients. Cultivates a network through social contacts and community participation and develops a network of external Centers of Influence.
- Customizes customer communications or presentations to provide fiduciary advice. Introduces planning concepts to meet client needs for assigned accounts. Leads colleagues in completing analysis and recommendations for senior management or committee review. Serves as a subject matter resource for the fiduciary team and market leadership. May serve as a point of escalation for problem resolution and stand as a proxy for fiduciary leadership.

Required Education and Experience :

Roles at this level typically require a university / college degree. Higher level education such as a Masters degree, PhD, or certifications is desirable. Industry relevant experience is typically 8+ years. Specific certifications are often required. In lieu of a degree, a comparable combination of education and experience (including military service) may be considered.

JD and Ultra High Net Worth client experience greatly preferred.

To learn more and apply, visit www.pnc.jobs and search by keyword ‘308816BR’.

NC provides equal opportunity to qualified persons regardless of race, color, sex, religion, national origin, age, sexual orientation, gender identity, disability, veteran status, or other categories protected by law.