RMD | R.M.DAVIS
PRIVATE WEALTH MANAGEMENT

Employment Opportunity:
Estate Associate – Portland

Do you want to work with an industry leader, in a dynamic environment that fosters professional growth? Then consider joining the **R.M. Davis** team! With $6+ billion in assets under management, **R.M. Davis** is Northern New England's largest wealth management firm, with offices in downtown Portland, Maine, and Portsmouth, New Hampshire.

Our clients trust us with their wealth, with their toughest questions, and with their most important decisions. They count on our team to help guide them through life's critical moments. We seek team members who embrace this opportunity.

Headquartered in the heart of Portland, R. M. Davis is a proud member and contributor of the local community. Located just steps from restaurants, shops, entertainment, and other professional firms, our team enjoys an area that truly offers a "work, live, and play" environment.

The position

We are hiring a full-time **Estate Associate** to join our growing team in Portland, ME. If you are a self-motivated professional with a customer service mindset and a passion for working in the financial services industry, apply today!

Your responsibilities

Given the nature of our work, our administrative team plays an integral role in the success of our firm, and the work we do for our clients. The **Estate Associate** role facilitates the account administration and transition process for deceased clients' individual and trust accounts. **The Estate Associate** also provides back-up support with certain trust administration tasks for accounts for which a member of the Company serves as Trustee.

The **Estate Associate** is responsible for reviewing wills, trust agreements, and beneficiary designations of deceased clients to determine estate structure and asset distribution, and facilitates/prepares required account paperwork, including account applications, distribution schedules, and termination letters. The **Estate Associate** position coordinates with multiple internal departments and interacts directly with beneficiaries, custodians and other external professionals, including attorneys and accountants.

Your skills

- Prior experience in a bank trust department or law office specializing in estate planning or public accounting administration.
- Bachelor's degree in business or a related field is required.
- Knowledge and understanding of trust and estate law and fiduciary principles.
- Prior experience reviewing and analyzing estate planning documents, fiduciary tax returns, and other related legal/tax documents.
- Professional, friendly demeanor with a client-first mindset.
- Excellent interpersonal, relationship building and communication skills.
- The ability to manage tight time frames and perform multiple and competing tasks efficiently and independently.
- Strong attention to detail and problem-solving skills.

Your Company benefits

- Competitive salary and bonus
- 401k plan with employer contributions
- 100% company-paid employee health and disability insurance
- Paid time off
- Company-paid, parental leave
- Education reimbursement
- Company paid, covered parking
- Professional office setting
- Hybrid remote work policy
- Collaborative work culture

This position is non-exempt and therefore qualifies for overtime pay.

If this sounds like you, please send a cover letter and resume to:

R.M. Davis, Inc.
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