TAG

FIDUCIARY SERVICES DEPARTMENT MANAGER

Are you passionate about providing trusted guidance and safeguarding the financial goals and interests of clients during some of life's most complex transitions? Do you see yourself fostering a collaborative, high-performing environment where excellence, integrity, and client well-being are paramount? Are you ready to lead by example, championing transparency and responsibility while supporting your team in delivering outstanding fiduciary services?

Welcome to TAG! Our reputation for excellence and responsiveness has driven growing demand for our services, and we're expanding to meet that need.

Job Description:

You will oversee a team of Fiduciary Services professionals who serve as trusted stewards for clients, their families, and legal representatives, ensuring client goals are carefully managed and that TAG fulfills its decision-making responsibilities across a range of unique situations.

Your team will help clients navigate estate administration, trust management, guardianships, and serve as agents under powers of attorney. Upholding principles of integrity, accountability, and respect, your department bridges gaps in client support, providing peace of mind and confidence as clients face important decisions and transitions. The role requires sound judgment, discretion, effective communication, and proficiency in complex family and financial dynamics.

Responsibilities include:

- Providing leadership and expert guidance to the Fiduciary Services team, supporting their ongoing professional development and growth.
- Overseeing and balancing team caseloads, ensuring equitable distribution and consistent high-quality service, including regular case reviews and shadowing.
- Participating in TAG leadership meetings and conducting regular one-on-ones with team members to mentor, resolve challenges, and foster a culture of collaboration and trust.
- Monitoring and evaluating team performance, offering constructive feedback and facilitating continuing education in fiduciary best practices, compliance, and ethics.
- Assisting with onboarding and training new team members in the unique demands of fiduciary service roles.
- Serving as a resource for complex or high-risk case consultations, helping staff navigate challenging legal or financial situations with confidence.
- Ensuring strict compliance with organizational policies, legal standards, and all applicable regulatory requirements.
- Collaborating with TAG leadership to refine processes, innovate services, and contribute to the ongoing growth and evolution of the department.

Who We Are:

TAG is a thriving fiduciary and eldercare consulting firm whose motto, "TAG: we're it!", signifies our commitment to being the trusted solution for guiding individuals and families through the complexities of aging, incapacity, and financial stewardship. We pride ourselves on advocacy, learning our clients' values, and honoring their wishes with diligence and respect through every transition. Our team is composed of knowledgeable professionals who build lasting relationships and are recognized as leaders in both the field and the community.

Who We Are Looking For:

You are an experienced (10+ years) fiduciary professional—perhaps a certified trust or fiduciary advisor, accounting professional, or paralegal with a strong background in trust, estate, or guardianship administration—who is passionate about supporting vulnerable individuals and families. You have a deep understanding of the fiduciary standard, the nuances of estate and trust management, and the sensitivity to approach complex or emotionally charged matters. You are proficient in Microsoft Suite (e.g., Excel, Outlook, Word, Teams). You have experience in and enjoy supervising, mentoring, or leading teams and inspire those you work with to provide ethical, client-centered service. Like us, you are open, trustworthy, resilient, and capable of navigating sensitive conversations with professionalism and empathy.

What You Do:

Our Fiduciary Services professionals serve clients by administering trusts, managing estates, guardianships, acting as agents under power of attorney, and providing efficient solutions to ensure every decision aligns with the client's goals and stated values. As the department manager, you lead and support your team, equipping them with resources, mentorship, and strong leadership so they can excel in their roles. You work collaboratively with outside professionals that TAG employs to ensure our legal and financial compliance, including attorneys, CPAs, financial advisors and more. Your approach is holistic and client-centered, with a focus on proactive planning, risk management, education, and advocacy. Through your guidance, you will help both clients and colleagues achieve stability, clarity, and confidence in the face of life's most important transitions.

Job Type: Full-time, in office
Pay: from $40/hour, exempt, salaried
Benefits:

- Paid time off
- Medical, dental, vision coverage
- Retirement Plan
- and more

Schedule:

- Monday to Friday
- Shared rotation for telephonic emergency support for clients (after hours/weekends)

Apply today (3 ways to apply) by uploading your cover letter and resume by any one of the following:

1) Apply on our website: https://trinityadvocacygroup.com/careers/
2) Follow this link: https://us.workplace.datto.com/filelink/3e29a-65a32336-488ca70597-2
3) Follow this QR code:

No phone calls, please.

TAG is the premier, private care management and fiduciary services firm located in Oak Brook, IL, proudly serving DuPage, Kane, Will and Suburban Cook counties since 2015.