



## **Director of Legacy Development**

*"For in the end, it is impossible to have a great life unless it is a meaningful life. And it is very difficult to have a meaningful life without meaningful work. Perhaps, then, you might gain that rare tranquility [satisfaction] of knowing that you've had a hand in creating something of intrinsic excellence that makes a contribution. Indeed, you might even gain that deepest of all satisfactions knowing that your short time here on this earth has been well spent, and that it mattered." - Jim Collins, Good to Great*

Trustee Services Group PLLC ([www.TrusteeServicesGroup.com](http://www.TrusteeServicesGroup.com)) is looking for a professional to serve as Director of Legacy Development to inspire and help our deferred clients to thoughtfully construct and leave a legacy reflective of their personal values through their estate plan. For our existing Trust clients, our Director of Legacy Development will be asked to inspire and equip our Trust beneficiary clients to live a meaningful life through the thoughtful stewardship of their God given time, talent, and resources.

### **About Trustee Services Group**

Based in Colorado Springs, Colorado, Trustee Services Group (TSG) is a professional services firm specializing in estate and trust fiduciary services.

TSG has two lines of business . . .

- 1) Under our dba Estate Services Group, we serve as Executor / Personal Representative (Will), Successor Trustee (Revocable Living Trust) and Financial Agent (Durable Power of Attorney) in serving families during times of incapacity and when their loved one passes.

TSG has over 200 "deferred clients" (families that have named TSG within their estate plan to serve as set forth above).

- 2) TSG also serves as Trustee on all types of irrevocable trusts, most relevantly including Family Legacy Trusts and Charitable Foundations.

Family Legacy Trusts are trusts which most commonly are or have been funded through an estate for the benefit of subsequent generations of family members.

Charitable Foundations have been established by individuals and families to support philanthropic causes reflective of their personal and family values.

With its home office in Colorado Springs, Colorado, and with office presence in Denver, Fort Collins and Cheyenne, Wyoming, Trustee Services Group exists to collaboratively help families and individuals successfully navigate the various complexities of generational wealth.

TSG has clients and relationships throughout the United States.

## **About the Position – Director of Legacy Development**

The Director of Legacy Development is a new position that will initially be a part-time position requiring involvement ranging between 8 – 16 hours per week or 32 – 64 hours per month.

The Director of Legacy Development will work closely with TSG's CEO, Director of Operations and TSG's marketing consultant in the development of this unique focus and implementation of related resources which will help families and their professional advisory team successfully navigate the complexities of generational wealth.

The successful candidate can fulfill their responsibilities remotely and does not need to live in Colorado or Colorado Springs.

### **Responsibilities**

- 1) Through programs and marketing communications, inspire client audience to obtain vision and tools for personal legacy / success.
- 2) Understand and organize marketplace resources which can help our deferred clients to thoughtfully construct and leave a legacy reflective of their personal values through their estate plan and equip our Trust beneficiary clients to live a meaningful life through the thoughtful stewardship of their God given time, talent, and resources; and
- 3) Connect clients to appropriate tools and resources to work toward accomplishment of personal legacy / success.

The successful candidate must be a self-motivated and responsible individual, driven to make a difference in others, who can work independently and thrive in an environment where time management, communication, attention to detail and timely follow-through are critical. A proven strong character and desire to work in a team environment is a must.

### **Compensation & Benefits**

\$17-\$25 per hour

TSG also offers a full package of employee benefits including health, vision and life insurance, as well as a 401(k) plan.

### **Qualifications**

The responsibilities, skills and qualities required of the Director of Legacy Development position include:

- Exceptional character
- Desire to serve, inspire and make a difference in others
- Appreciation for family, personal responsibility and personal growth
- Confidence to lead conversations with clients, attorneys, financial advisor and tax professionals when necessary
- Understanding of the challenges of wealth in family and inherited wealth will prove helpful

- Experience with family foundations and charitable grant making is a bonus
- Excellent organization, communication, and relationship skills

**If this job is for you . . .**

- Send email with cover letter and resume to [CindyM@TrusteeServicesGroup.com](mailto:CindyM@TrusteeServicesGroup.com)
- In email subject line put "Director of Legacy Development"
- Submit your resume as a PDF attachment.
- Include a cover letter.