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Why did you decide to become a STEP member and which route did you chose?

I decided to take the STEP Diploma exams which helped me gain promotion to Manager. I do miss the face-to-face courses before the exams, as the tutors were very knowledgeable, approachable and fun and it is good to interact with your peers from other companies.

What qualifications/courses have you completed to get to where you are in your career?

I have completed the STEP Diploma and also feel it is important to continue attending courses in order to keep abreast of legislative changes, what is happening in the different jurisdictions and markets as well as training to help you with other parts of your work.

What advice would you give to someone thinking of beginning a career in trusts and estates?

The job is so much more varied than the description 'trust administration' conjures up. A trust administrator gets involved with investments, property deals, changes in family circumstances, legal issues, insurance and so on. The chance to learn about cultures different to your own has to be one of the most fascinating parts of the role.

What surprised you most about the industry?

The variety of the job and how, 11 years on, I am still learning new things. Also, the chance to travel to meet clients and live in different places was not something I had thought about before I joined the industry.

What would you say are the main challenges for the industry and for your particular firm in the future?

Perhaps the biggest challenge is keeping up-to-date with market developments so that we can modify existing or create new products to continue offering effective estate planning solutions to our clients. Staff retention is

often an issue, too, because the industry is expanding and trust companies need qualified and experienced staff.

What is a typical day for you in your job?

I arrive at 7.30am and check e-mails from the Bankers and Relationship Managers to see what action needs to be taken. We have various meetings throughout the day to discuss trust issues, fee collections, HR issues and anything else that comes up and in between. I also try to help out my team with anything they need assistance on.

What are the best parts of the job?

Meeting clients and interacting with colleagues and outside professionals. I find the job constantly challenging and you never know what issue is around the corner.

Describe your job in three words.

Motivating, challenging and rewarding.