



Trust Department Policies and Procedures

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Sheshunoff's **Trust Department Policies and Procedures** manual offers the trust manager a comprehensive action plan for implementing and maintaining trust department policies and procedures that will protect the interests of both the bank and the bank's customers. With this manual as a guide, the trust officer can avoid costly mistakes and common compliance violations. More than 200 policies and procedures provide the critical internal controls necessary to achieve an institution's strategic objectives, maintain regulatory compliance, and effectively manage risk in the trust department.

Divided into six comprehensive sections, the 200+ policies and procedures address the major concerns of the trust department manager. These include:

- Strategic planning and organization
- Marketing and business development
- Administration
- Investments
- Ethical standards
- Mutual fund retail sales

The manual provides the latest guidelines from every agency with trust oversight, including the OCC's Comptroller's Handbook for Fiduciary Activities, the Banking Circular, the Comptroller's Handbook for Compliance, the Code of Federal Regulation, the Trust Banking Circular, and other key publications.

Written in straight-forward language, the expert authors show how to apply the regulations to the day-to-day activities of the trust department staff. And the convenient and comprehensive set of trust policies and procedures can be easily customized and adapted to the institution's specific needs.

When every employee in the trust area understands department policies and follows department procedures, the safety of customer trust accounts and the future growth of the bank can be ensured.

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