Estate and Trust Specialist

We are very excited to post for an Estate & Trust Specialist and bring trust capabilities in-house for the first time! This new role will be responsible for providing Concentra estate and trust solutions to executors, clients, and future clients while being actively involved in business development initiatives that increase the visibility of BlueShore Financial and Concentra Trust in the market.

The Estate and Trust Specialist's primary focus is to deliver a seamless client experience aligned with the BlueShore brand and proactively identify Concentra and BlueShore financial products and advisory services that may assist clients with building and preserving their wealth.

Key responsibilities of this role are:

- Builds relationships with executors, existing and future clients by conducting discovery interviews, identifying their needs, and selling estate & trust solutions.
- Promotes Estate and Trust services within our portfolio of assigned clients.
- Drives referral business by identifying opportunities for asset consolidation, insurance, lending and other financial services. Conducts due diligence, collects information and completes documentation for new business opportunities.
- Understands and promotes BlueShore and Concentra products and services and communicates to existing and future clients how we can improve their financial lives.
- Acts as a trusted advisor to clients and provides estate and trust advice through dedicated support and service.
- Actively aligns the BlueShore brand and marketing to the client experience.
- Coordinates with external partners such as lawyers and professionals to coordinate wills, estates and trusts to ensure a seamless client experience.
- Acts as a subject matter expert and resource for the organization on trust and estate issues.
- Proactively creates awareness and ongoing education about estates and trust solutions by delivering presentations and seminars to clients and staff.
- Stays well connected with clients, including executors, co-executors, attorneys, co-trustees and beneficiaries, through a variety of communication channels including in person and electronic channels (email, video conferencing) to maintain relationships, better service clients and uncover their needs.
- Actively participates in community and business events to raise visibility and present BlueShore Financial as the financial institution of choice.
- Builds and maintains close working relationships with internal business partners across the organization to support the achievement of objectives and strategic goals.

Qualifications and Experience

- 5 years direct experience in Estate Planning, Personal Trust and Estates
- Post-secondary diploma or degree in business or related field or an equivalent combination of education and experience
- Trust and Estates Practitioner (TEP) designation an asset
- Expert knowledge of estates, trusts and related financial products and services
- Previous sales/business development experience within the banking industry
- Strong interpersonal and presentation skills
- CFP designation an asset

- Flexibility to travel and work irregular hours to accommodate client meetings, networking and community involvement, and business between BlueShore and Concentra offices

What can BlueShore Financial can do for you?

- Limitless career progression opportunities.
- Opportunity to build and grow the position from scratch.
- A Performance Rewards Program which pays a variable cash reward recognizing the achievement of corporate, team and individual goals.
- Comprehensive Total Rewards Program including bonuses, pension, flexible benefits and competitive compensation.
- Opportunity to work in a world class, award winning organization.

What BlueShore Financial needs from you:

- Accountability, in all directions.
- "Can do" attitude.
- The drive to provide a premium level of service regardless of location or position.
- Professional appearance and manner.

Got awards? At BlueShore Financial we are constantly innovating, connecting and improving to deliver exceptional client and employee experiences. As a result, we have grown to become an award winning organization, garnering both local and national attention for our progressive practices.

Be Richly Valued. At BlueShore Financial, our employees are as important as our clients. We strive to create a workplace culture of openness, empowerment, trust and passion. Our values unite our organization and are our guiding compass. But it is our exceptional staff that bring our corporate values to life. They are passionate about delivering exceptional client service and a banking experience that promises to impress. And this level of engagement shows. We've been formally recognized making Aon's "50 Best Employers in Canada" list eight years in a row and as one of "Canada's Most Admired Corporate Cultures" in Canada by Waterstone Human Capital.

From the moment you walk into one of our Financial Spas™, you'll know you've arrived at a special place, where all the elements work together to stimulate the senses and create a distinctive atmosphere unlike any financial institution you've experienced. We embrace the west coast lifestyle, while providing a premium and sophisticated experience for our clients and employees. You may not recognize us, but we've been serving the lower mainland for almost 75 years! But this isn't the Credit Union of your childhood. We're different and better.

Concentra - As one of Canada's Best Managed Companies for 14 consecutive years, Concentra prides itself on fostering employee engagement and a workplace of openness and respect.

Concentra is Canada's leading provider of wholesale banking and trust solutions to credit unions from coast to coast. With deep co-operative roots, Concentra is focused on creating value for the credit union system. We partner with credit unions to ensure over five million Canadian members can choose competitive financial services from their local credit union.

Concentra Trust – a wholly-owned subsidiary – has been delivering estate and trust services nationwide for over 65 years.

To apply please visit the Career page of BlueShore Financial's website at www.blueshorefinancial.com/careers/