

Executive Trust Officer

We're on a mission to build the relationship-focused bank of the future and we're looking for the passionate collaborators, innovators, advisors, and leaders who can get us there. Our distinct culture is built on a shared commitment to do what's right for our clients, our people, and our communities, and we strive for excellence in everything we do. Because life at CIBC is not only what you do, but how you do it.

To learn more about CIBC, please visit [CIBC.com](https://www.cibc.com)

What You'll Be Doing

Reporting to the Director, Estate & Trust Services, the Executive Trust Officer provides indirect or direct oversight and guidance to a team of Trust Officers, Associate Trust Officers and Trust Administrators to administer estates, trusts, and power of attorney accounts, and personally administers the larger, more complex accounts including estates that have corporations. This role fosters a proactive client service environment while building and maintaining strong relationships with clients and internal partners.

How You'll Succeed

- **People Management** - Provides effective leadership, coaching and oversight to Estate & Trust team. Build team and individual capabilities by providing development opportunities such as job shadowing, special projects, and training. Manage performance by providing fair and accurate formal and informal feedback, identifying and removing obstacles to performance and by explaining how performance expectations align with business priorities. Set appropriate context when assigning work to ensure that individuals' roles support the achievement of the business unit's priorities and CIBC's overall goals.
- **Trust & Estate Acumen** - Primary accountability for the timely, accurate, and professional administration of complex estate, trust and power of attorney accounts as well as other special trusts. Maintains up-to-date knowledge and understanding of estate, trust and power of attorney legislation. Identifies and mitigates account risks while adhering to all CIBC Trust Policies & Procedures, including cash management, fee collection, account opening, etc. As a member of the Discretionary Policy Committee, participates in exercises of discretion for clients where CIBC Trust has been granted discretion in the Will, Trust Agreement, Power of Attorney or court order.
- **Collaboration** - Partners effectively with internal experts from the Investment Management Department, Tax Department, and Property Management department to provide oversight and guidance on client investment, tax and property issues. Engages external professionals as required. Supervises account investments to ensure consistency with account objectives, constringing documents and legislation. Oversees the management of account-owned corporations as required, including shareholders' meetings, issuance and preparation of financial statements, acting as a director, etc. Develops and maintains a strong partnership with CIBC Trust Senior/Trust & Estate Consultants (STEC) in order to provide excellent client service. Leads account administration while engaging the STEC when required, and acts as the primary client contact.
- **Operational Support** – Assists one or more Directors as a technical expert in creation of new policies, procedures, documents, etc. Assists in developing standards in administration, and vetting new policies and procedures. Leads and participated in projects as assigned.

Who You Are

- **You have** 10+ years' experience in an Estate & Trust industry.
- **You are a certified professional with** successful complete the Canadian Securities Course (CSC). MTI/STI/TEP designations are an asset
- **You have** extensive experience administering various estate, trust and power of attorney accounts and personal holding corporations
- **You have** knowledge of other provincial trust and estate law is an asset.
- **You have** detailed knowledge of accounting, financial planning, budgeting and investing sufficient to administer a range of complex Trust Accounts.
- **You're passionate about people.** You find meaning in relationships, and surround yourself with a diverse network of partner. You build trust through respect and authenticity.
- **Values matter to you.** You bring your real self to work and you live our values - trust, teamwork, and accountability.

What CIBC Offers

At CIBC, our people are our greatest asset. You'll become part of a diverse community that acknowledges everyone's unique talents, and empowers teams to do what's right for the client, and to do it well. As part of our team, you will:

- **Thrive:** Benefit from an open and approachable culture that provides the flexibility and support you need to integrate your life at work and at home
- **Connect:** Work in a place where the right technology and infrastructure fosters innovation, collaboration and creativity
- **Develop:** Grow your skills and career through our best-in-class onboarding experience, ongoing learning opportunities, individual development planning, and comprehensive product training
- **Prosper:** Share in our collective success with a competitive salary, incentive pay, banking benefits, health benefits program, and employee share purchase plan

What You Need to Know

- CIBC is committed to creating an inclusive environment where all team members and clients feel like they belong. We seek applicants with a wide range of abilities and we provide an accessible candidate experience. If you need accommodation during the application or interview process, please contact: Rejni.Mile@cibc.com
- You need to be legally eligible to work in Canada at the location(s) specified above and, where applicable, must have a valid work or study permit.
- This is a regular full time role with a schedule of 37.5 hours each week, you may be required occasionally work outside of business hours.