LEGACY
PRIVATE TRUST™

Job Posting

Job Title	Trust Officer
Job Status	Full Time (40hrs+/wk)
Position Overview:	Legacy Private Trust is looking for a trust and estates professional to join our small but mighty dynamic company. The ideal candidate will be experienced, provide outstanding quality service, be thriving with integrity and be forward thinking. The Trust Officer will possess detailed technical knowledge of estates and trusts, powers of attorney, guardianships, foundations and agency accounts, together with experience in the administrative aspects of such accounts. The Trust Officer has the primary responsibility for managing the client/beneficiary/co-trustee relationships, providing exceptional client service, managing trust, estate and other fiduciary services and coordinating the application of any specialized expertise or services that may be required to ensure the effective administration of the accounts. The Trust Officer will also be responsible for account specific administrative tasks including communication with clients and third-party organizations, as well as periodic support in completing back-office department functions.
Requirements	• University degree or equivalent industry experience; • Noteworthy estate and/or trust experience and knowledge of fiduciary responsibilities; • Substantial experience in financial or trust services involving thorough knowledge of trust accounting principles and systems; • Experience dealing with high net worth clients preferred; • Successful completion of CSC preferred; • Successful completion of professional designation/diploma (TEP, CETA, MTI or STI) preferred; • Thorough knowledge of Personal Trust policies; • Working knowledge of the Financial Planning processes and tools; • Bilingual in English and French an asset.

Skills	- Experience working in a team combined with strong service skills; - Excellent written, verbal and electronic communication skills; - Organization and the ability to prioritize and multi-task; - Accountability; - Ability to complete time-sensitive tasks efficiently and effectively; - Comfortable working with financial statements; - Ability to work effectively with others and present yourself and the company as a professional business partner with clients and partners; - Sound judgement, critical thinking and problem-solving skills; and - Comfortable with trust accounting software.
Job Functions and Responsibilities	**Trust Department Duties**: - Manage administration of estates, trusts, guardianship/powers of attorney, estate and trust agencies, working with Trust Administrators and Associates to provide the highest degree of service to clients; - Responsible for the resolution of operational, technical and department issues encountered in the administration of files; - Provide personalized service to clients/beneficiaries at established levels, exemplified by timely and accurate account administration coupled with demonstrated technical expertise, personal integrity and an ability to respond to the needs and concerns identified by effective interaction with them, their advisors and where applicable, the co-trustees; - Limit corporate risk exposure by ensuring that account administration is carried out in compliance with defined policies and procedures and audit standards, with particular emphasis on the quality of presentations to the Discretionary Powers Committee for guidance and/or approval; - Maintain current knowledge of legislative, administrative and economic issues that impact the management of the accounts and demonstrate an ability to communicate on a broad range of legal and financial matters with clients and their advisors, with particular expertise in estates, trusts, wills, investment and taxation matters; - Review of current processes and software for efficiencies and updates; - Contribute to business and strategic plan goals for the department; - Promote and demonstrate the overall objectives and mission of Legacy Private Trust; - Review and collect accounts receivable for all active clients; - Management of CRM and implementation of new CRM projects;

- Ensure completion of quarterly file audit;
- Responsible for maintaining a high service standard and level of communication to various team players and partners;
- Delegate account administration specific tasks to Trust Administrator and co-ordinate to ensure completion of such duties;
- Co-ordinate with VP, Investments concerning client asset management and investment reviews;
- Daily monitoring and posting of account transactions;
- Assist VP, Investments with the administration of Common and Premium Funds when required;
- Coordinate with Tax & Accounting Department to ensure completion of client/account tax returns;
- Collaborate with Compliance Department to ensure proper procedures and protocol;
- Facilitate and maintain internal audit procedures in conjunction with other Trust Department members;
- Contact service providers, government agencies and other related parties when necessary for account administration purposes;
- Monitor client account activity and balances;
- Arrange for transfers of funds from third party investment managers;
- Monitor management plan adherence for guardianship accounts;
- Check fee calculations for trusts and estates as needed;
- Draft various forms of written communications to clients and third-party organizations;
- Complete account-opening and closing procedures;
- Ensure all account information on internal systems is current, complete and accurate;
- Assist with trust administration duties during quarter-end periods when necessary to maintain service levels; and
- Other duties as required.

Department/Company Development:

- Monitor systems and processes to identify areas for improvement and to develop best-practices; and
- Other duties as required.

Personal Development:

- Take necessary courses to achieve next steps in desired career path within the organization; and
- Attend relevant industry seminars and presentations.

Company Description	At Legacy Private Trust we specialize in professional fiduciary services including the management and administration of trusts, estates, power of attorneys, agencies, guardianships, foundations and tax & accounting services. Legacy Private Trust offers a dynamic workplace, prime downtown office location, and employer-paid benefits package.
Salary	To be discussed.
Application Instructions	Please submit a resume to: Krystal Delle Chiaie, Lead, Human Resources kdc@legacyprivatetrust.com
We thank you for your interest. Please note that only successful applicants will be contacted.	