



With close to 50 years of physician-focused experience, MD has one main goal: to help Canadian physicians and their families achieve financial well-being. Our commitment to work/life integration, employee well-being and ongoing learning are key factors that contribute to our overall success.

For the sixth consecutive year, MD Financial Management has been recognized as one of the Achievers 50 Most Engaged Workplaces in North America. The annual award, given by Achievers, an industry-leading provider of employee recognition and engagement solutions, commends top employers that display leadership and innovation in engaging their workforces.

### **THIS ROLE MAY BE LOCATED ANYWHERE IN CANADA**

#### **What You Will Do:**

Reporting to the Vice President, Wealth Planning Practice Group, as the HNW Estate and Trust Advisor and a member of the HNW Centralized Planning Group (HNWCPG) you will provide strategic, educational and technical support on estate and trust matters including taxation, financial management, estate planning, retirement planning, asset management and risk management to HNWCPG, HNW Planners and internal/external HNW clients. You may also partner with internal and external centres of influence as needed, including client accountants, business advisors, other Central Support field experts.

A critical part of your role will involve decision-making related to estate and trust matters affecting stated areas of responsibility within the HNW Planning Group while adequately assessing and managing risk exposure to the organization. Specifically, you will review as required, new and existing HNW Financial Plans submitted by the HNW Planners and act as the technical Estate & Trust expert, providing support on an ongoing basis. You will identify any planning flaws or risks associated with the proposed plan and as needed, suggest alternative planning that mitigates risk to the client and/or provides additional planning opportunity.

You will also identify the impact of changes in estate and trust legislation on new and existing client plans/planning strategies and provide advice and recommendations to the HNW Financial Planners, determining any changes needed to the client's products or services.

You will play a key role relative to initiating discussion and contributing decisions in the capacity of the HNW Estate & Trust SME on matters relating to the 6 core topics of financial planning as well as acting as the "point person" for receipt of all marketing collateral needing material review by MDPT relating to the HNW space.

You will also be accountable for determining the appropriate action necessary for dealing with a wide range of problems and other matters as they arise and determining when the VP, Estate & Trust, or other MD leaders should be informed of any significant issues.

#### **What You Need:**

You possess a minimum of 10 years' experience in charitable giving, estate & trust structure and administration (both planning and compliance) as well as personal and corporate trusts and reporting requirements, and are seen as a key Estate & Trust technical resource, capable of providing analysis on the viability of potential planning advice and strategies relating to specific client plan recommendations.

You have the Trust and Estates Practitioner (TEP) Designation or equivalent as well as your STEP designation.

CFP or other relative Financial Planning designation/experience is preferred.

Extensive experience in the use of insurance in estate planning would be an asset.

Candidates possessing a LL.B and/or who are bilingual, are preferred.

#### **What You Bring:**

- You genuinely care about and are inspired by doing the best for your clients through providing tailored and timely advice.
- You use your exceptional interpersonal skills to build rapport with and influence your clients and understand the critical importance of client trust.
- You are naturally curious and have the ability to quickly and clearly understand the client's perspective which in turn directly influences your choice of service, strategies and products and how you present them to clients.
- You are an outstanding communicator. You actively listen and tailor your response accordingly based on your client's level of understanding and interest.
- You are a proactive and strategic thinker with an innate ability to determine the impact of changes and provide sound recommendations.
- You are self-motivated – finding ways to meet tough goals while expecting nothing less than the best of yourself.
- You're a natural coach – possessing the ability to motivate other individuals to achieve business critical goals and navigate through times of extreme change.
- You take great pride in your personal development and enjoy learning new tools and techniques,

- You embrace change and thrive in an ever-changing environment where multi-tasking and tight deadlines are the norm.
- You enjoy the collaborative process and look forward to partnering with other team members to best service your client.
- You have a breadth and depth of core financial products and a high-level of comfort and confidence in presenting this information to clients.
- You are self-motivated – finding ways to meet tough goals while expecting nothing less than the best of yourself.

**What Success Looks Like:**

- You are passionate about the MD value proposition and actively look to acquire new clients.
- Your clients are engaged, excited to be with MD, and on the path to attaining their financial goals.
- You are constantly learning and honing your skills.
- You find new and exciting ways to improve the experience of your clients.

You feel rewarded and recognized in a way that inspires you to do your best work.