



Executive Trust Manager – Toronto, ON

Join the Global Community of Scotiabankers to help customers become better off.

### **Job purpose**

As an Executive Trust Manager working in a Scotia Wealth Management office, you possess exceptional knowledge and experience in Estate and Trust administration, coupled with a proven track record in successfully managing trust professionals and fronting relationships with high profile families who have complex financial assets, family dynamics and estate plans.

You are an experienced relationship and people manager responsible for supporting the company's strategy and revenue goals by ensuring you and your team profitably deliver a best in class client experience and present the full suite of Scotiabank's high quality solutions to high net worth clients of Scotia Wealth Management, in accordance with our clients' needs and expectations and in compliance with policies and procedures. You also assist your team with the identification and pursuit of new business opportunities, both inside and outside Scotia Wealth Management.

You are client-centric and entrepreneurial, with a strong sense of proactivity and you are effective at building and maintaining deep relationships with clients as well as internal and external partners. You are a proven people manager adept at developing and supporting your team's day to day pursuits as well as their career goals and objectives. You are a go to resource for complex Estate and Trust matters for your team and partners in the Scotia Wealth Management office.

### **Key accountabilities**

#### 1. Relationship Management & Client Service

- Ensure the provision of a best in class, proactive and personalized client experience to high net worth clients and beneficiaries, exemplified by timely and accurate account administration coupled with demonstrated technical expertise, personal integrity and an ability to respond to stated and unstated client needs and concerns.
- Build and maintain effective internal and external partnerships, with a view to providing seamless, impactful solutions across a variety of financial services disciplines.
- Oversight and responsibility for your team's revenue collection and you contribute to the branch's profitability by accurately forecasting and overseeing the timely collection of fees, including making recommendations regarding situations that may warrant a non-standard fee agreement.

#### 2. New Business Development

- Assist your team in the establishing a strong presence and proactive relationship with a select number of retail branches to identify and close immediate and recurring fee opportunities.
- Work closely with the Estate and Trust Consultants, Scotia Wealth Management partners and their clients to assist with the closing and ongoing servicing of new wealth transition solutions.
- Develop acquisition strategies and maintain a robust prospect pipeline, in order to generate sustainable and profitable growth.
- Assist your team in identifying, pursuing and closing new business opportunities, both inside and outside Scotia Wealth Management.

#### 3. Risk Management

- Limit corporate risk exposure by ensuring that account administration is carried out proactively and in compliance with defined policies/procedures and audit standards, including the timely escalation of issues to the appropriate internal oversight groups as required.

- Maintain expert knowledge of legislative, administrative and economic issues that impact the management of your accounts and demonstrate an ability to communicate on a broad range of legal and financial issues with clients and their advisors, with particular proficiency in estates, trusts, wills, and investment and taxation matters.

#### 4. People Management

- Accountable for the selection, motivation and development of a team of Trust professionals, including establishing objectives, increasing their trust knowledge and managing the annual performance appraisal cycle, including the Performance Appraisal Review (PAR) and the Employee Development Plan (EDP).

#### **Education/Work experience/Designations**

- Experienced people manager for teams of 10 or more Trust professionals
- Entrepreneurial and capable of consistently delivering a proactive best in class client experience.
- Effective at building and maintaining deep relationships and partnerships.
- Proven ability to manage competing priorities without losing focus on key accountabilities
- Strong interpersonal, verbal communication and negotiation skills and professionalism.
- Deep understanding of the wealth management landscape and a demonstrated ability to work in an environment that demands tact, objectivity and sensitivity.
- Strong change management skills and ability to adopt technology and reporting platform changes to support operational improvements, sales management process improvements, etc..
- Proven ability to execute against financial and business development targets and profitability measures.
- University degree
- Minimum of 10 years of industry experience.
- STI, MTI or TEP designation/diploma
- Proven success in high net worth client relationship management
- Successful completion of CSC
- Expert knowledge of Trust Accounting Principals
- Expert knowledge of Personal Trust Policies
- Working knowledge of the Financial Planning process and tools
- Experience as a Director of an Organization and/or Investment Holding Company

As Canada's International Bank, we are a leader when it comes to inclusion. We are a diverse and global team, speaking more than 100 languages with backgrounds from more than 120 countries. We value the unique skills and experiences each individual brings to the bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. Candidates selected for an interview will be contacted directly. If you require accommodation during the recruitment and selection process, please let us know. We will work with you to provide as seamless a recruitment experience as possible.

**Interested candidates are instructed to apply online via the link below:**

<https://career17.sapsf.com/sfcareer/jobreqcareer?jobId=41212&company=scotiabank&username=>