



Senior Trust & Estate Consultant - Winnipeg

CIBC is a leading Canadian-based global financial institution. Through our three major businesses – Retail and Business Banking, Wealth Management and Wholesale Banking – we provide a full range of financial products and services to 11 million individual, small business, commercial, corporate and institutional clients in Canada and around the world. We invest in our businesses, our clients, our people and our communities to deliver consistent and sustainable earnings to our shareholders. To learn more about CIBC's Lines of Business, please visit our [website](#).

CIBC delivers access to career and development opportunities, safe and healthy workplaces, effective training, and positive work-life balance – so that employees are able to perform at their best, contribute to their communities and focus on cultivating deeper relationships with our clients.

Every year, CIBC is recognized for its business [successes](#), community commitment and employee initiatives. We are proud of these successes and are committed to creating an inclusive workplace and an environment where all employees can excel.

To learn more about CIBC and the CIBC Group of Companies please visit [CIBC.com](#).

CIBC Wealth Management is focused on providing excellence in relationship—based advise, service and product solutions that meet our clients' needs. We have a comprehensive offer that addresses the full spectrum of wealth building clients, from self-directed investors to high-net-worth private wealth individuals to institutional clients.

Job Overview

The Senior Trust & Estate Consultant (STEC) is responsible for business development within their assigned region, working with internal partners and external centers-of-influence to pro-actively grow the estates and trust business.

What You'll Be Doing

- Close sufficient new business to meet sales targets for agency and fiduciary appointments
- Pro-actively build partnerships with local representatives of Private Wealth Management, Wood Gundy, Imperial Service and with local centre's of influence, lawyers, and accountants.
- Create and implement a regional plan for sourcing business and raising awareness of CIBC Trust products.
- Assess new business opportunities, gather all required information, identify potential risks and provide mitigation strategies
- Pro-actively refer beneficiaries to CIBC partners in order to keep funds within CIBC.
- Expand professional knowledge by keeping abreast of Estates & Trusts legislative changes, jurisprudence and shifting industry trends

- Provide trust training sessions to target partner audiences and participate in client seminars.
- Prepare accurate and timely monthly reporting on business development activities.
- Work with CIBC Trust partners to ensure the smooth onboarding of new clients

What We're Looking For

- Proven sales and business development experience.
- A thorough knowledge of the administration of estates, trusts and powers of attorney/guardianship typically gained from 10+ years of experience in the estates and trusts industry.
- Post-secondary degree or equivalent experience, along with professional accreditations such as the Member, Trust Institute (MTI); and/or Trust and Estate Practitioner (TEP) or willingness to complete within a reasonable timeframe.
- Allied Professional qualification (LL.B., C.A., CGA, CFP, PFPC, Ch.P. etc.) would be an asset.
- Extensive knowledge of jurisprudence, legislation and regulations pertaining to the administration of Estates and Trusts.
- Proven success in building and maintaining professional HV client relationships.
- Demonstrated ability to effectively judge and manage individual/company/client risk while exercising discretion.
- Excellent organizational and time management skills to meet critical timelines while balancing multiple priorities.
- Well-developed research and evaluation skills to make prudent recommendations.

What CIBC Can Offer You

- Flexible health benefits, stock purchase plan, competitive incentive pay and recognition programs
- Competitive salary and banking benefits
- Career growth, development and continuous learning opportunities
- Opportunity to be involved in CIBC events that help our communities
- Click to learn more about [Rewards & Recognition](#), [Learning & Development](#), and [Employee Community Involvement](#)

What You Need To Know

- Must be legally eligible to work in Canada at the location(s) specified above and, where applicable, must have a valid work permit or study permit that allows the candidate to fulfill the requirements of the role

Apply Online: <https://cibc.taleo.net/careersection/jobdetail.ftl?job=17012500&lang=en>