Concentra®

Concentra is one of Canada's leading provider of wholesale banking and trust solutions to organizations across Canada. We partner with our clients to ensure Canadians have access to a range of competitive and innovative financial services to enable their success.

As one of Canada's Best-Managed companies, Concentra prides itself on a culture of client service, innovation, and strong values.

Concentra Trust – a wholly-owned subsidiary – has been delivering estate and trust services nationwide for over 65 years.

Concentra employees enjoy a competitive total rewards package and flexible work environment. We are looking for a results oriented individual to join our team, and are flexible on office location:

AVP, Estates & Trusts (Full-time, Permanent Position)

The AVP, Estates & Trusts role is directly responsible for estate and trust revenue through the development and management of profitable business relationships across Canada with strategic corporate and credit union partners.

Key Outcomes:
The AVP, Estates & Trusts, contributes to the achievement of the annual business targets for the Estate & Trust business lines by developing and managing relationships with partners to optimize business referrals, including counseling partners and provide actionable advice and appropriate business solutions at the strategic and operational levels, and developing a rapport to understand and be responsive to partner needs. This role also assists others in the area by mentoring and providing a level of expertise to build stronger relationships, and generate business. The incumbent will maintain awareness and understanding of legislative and regulatory requirements pertaining to the wealth management, financial services and trust market and its impacts. The AVP, Estates & Trusts gathers partner, client and market knowledge to identify potential new or enhanced solutions needed by partners and/or individual clients, providing leadership, coaching and mentorship to partners to enable them to effectively meet the estate & trust needs of their clients. In addition, this role is responsible for preparing and delivering high quality presentations, representing Concentra Trust at local, regional, and national industry events.

This role will cost effectively manage partner and client relationships by adjusting market representation to focus energies on strategic relationships, establishing and achieving success measures and targets for partner and client segments, managing profitable partner and client relationships, measuring personal targets to performance metrics and control associated expenses, and coordinateing the relationship between Concentra, the partner, and other business areas of Concentra.

The AVP, Estates & Trusts provides leadership to the estate & trust sales team to ensure sales efforts meet company and business goals. This includes ensuring the team receives appropriate training and coaching it requires to meet all service standards and expectations assigned by managing the performance of all estate & trust sales staff including establishing performance expectations and plans, and monitoring, providing feedback, coaching, reviewing, evaluating performance, handling recruitment, scheduling and vacation supervision in accordance with corporate policy.

Qualifications:
- Degree in Business Administration or equivalent combination of related professional designation or experience and formal education
- 5 years' senior level experience in strategic marketing, and/or sales within a financial institution
- 5 years' experience in sales coaching and leadership
- STEP designation would be preferred

Applications for this opportunity accepted until end of day **September 10, 2018.**

To apply, please visit our Career page at www.concentra.ca

We thank all applicants for their interest, however, only those selected for an interview will be contacted.