Position : Trust Associate **-** TD Private Wealth Management

Location : 1350 René-Levesque West, Montreal

Hours/Availability : 8:30 am - 5:00 pm

Status: Permanent – Full Time

How to apply: Please apply online (by October 3rd) on our career website: https://bit.ly/2p6xbVM

Job Description:
The Trust Associate Program is designed for individuals who have a goal of pursuing personal development to establish a career in the Private Client area and specifically in the Trust industry. The role is structured to enable individuals to acquire the required knowledge to manage the administration of estate, trust and agency accounts, to work with Trust clients and our partners in Private Client Services, and to complete courses leading to the professional designation, TEP, Trust and Estate Practitioner.

The successful individual will contribute to the integration of Wealth Management by providing excellent, proactive client-facing service to established clients and by supporting their business partners. Through the program, the Trust Associate will develop relationship management skills in support of a superior client experience in conjunction with their technical development as well as develop their ability to identify and escalate sales opportunities.

Through the training process, the position will be responsible for the management and administration of a group of estates, trusts and agency accounts as well as guiding individuals/families in the development of estate plans. Individual will be coached and mentored so that the exercise of judgment in fiduciary decisions, the development of an investment strategy and oversight over tax, investment, accounting and administrative services provided by other areas of the Company are learned. The role will include the ongoing relationship management of established client accounts including client beneficiaries and co-trustees.

As part of the development, the incumbents will learn through a combination of theory and hands on learning through shadowing, coaching/mentoring and participating in client interactions. The position is responsible for client profiling to identify/anticipate needs of clients and their families and managing effective referrals and hand-offs that deepen client relationships and result in the contribution of additional business.

Job requirements:

Education/Accreditations:

- Undergraduate degree
- Work towards completion of Canadian Securities Course
- Work towards completion of TEP-Estate and Trust Practitioner

Other Qualifications/Skills/Experience:

- You are an enthusiastic team player with a strong academic and extracurricular track record of accomplishment including completion of a post-secondary degree
- You possess previous experience that has allowed you to demonstrate your great relationship skills both with customers and with a team

- You enjoy working with a group of clients and to building long term client relationships
- Experience in the financial industry would be an asset
- Excellent communication and presentation skills
- Receptive to learning and implementing sales strategies
- Detailed oriented, strong administrative, analytical and problem solving skills. Strong time management skills, able to multi-task and prioritize effectively , committed to delivering a superior client experience
- Excellent communication skills(written and oral) (French and English)
- Proactive and demonstrate ownership and initiative in your actions
- Excellent relationship management and networking skills
- Focused on providing solutions and advice; comfortable in asking questions to tailor solutions for client needs
- Have a passion for getting to know people, understanding their situations and showing empathy
- Able to make a complex topic easy to understand
- Strong team player

At TD, we are committed to fostering an inclusive, accessible environment, where all employees and customers feel valued, respected and supported. We are dedicated to building a workforce that reflects the diversity of our customers and communities in which we live and serve. If you require an accommodation for the recruitment/interview process (including alternate formats of materials, or accessible meeting rooms or other accommodation), please let us know and we will work with you to meet your needs.