**<u>Trust Officer</u>**

Department Overview: TD Private Wealth Management takes a sophisticated and holistic goals discovery approach to wealth planning and protection to provide highly personalized advice, solutions and service to clients.
**Private Trust** builds dynamic and long-lasting relationships with high net worth clients. Our highly integrated core team and other wealth partners work seamlessly together as ONE TD to help clients manage, preserve or transfer wealth according to the client's wishes for future generations.

Job Description: Do you enjoy and excel in providing seamless service delivery to high value clients? Do your relationship skills and knowledge set you apart and instill great confidence in clients and colleagues? If so, then we have a role for you. As **Trust Officer**, you will manage existing and newly referred estate, trust and agency accounts of varying complexity. You will thrive building and maintaining trusted relationships with clients, beneficiaries and co-trustees.
In addition, you will:

- Build and maintain relationships with clients, beneficiaries and co-trustees, with responsibility for client profiling to identify and anticipate needs and manage sales and referrals
- Create and maintain a comprehensive advice plan for clients with complex needs and possess the requisite skills to advise in niche areas where appropriate
- Possess a deep understanding of the business, competitive landscape and the economic and legal/regulatory environment, particularly as it affects the industry and applies to Private Trust clients
- Lead, motivate and develop relationships with internal and external business partners to develop, sustain and model highly productive working relationships and contribute to team development
- Facilitate the integration of Trust products and services by working carefully to understand client needs and goals and by working closely with other business and wealth partners to ensure all needs are met
- Exercise care, judgment and discretion involving a range of account management needs including tax, investment, administrative services and partner documentation
- Stay ahead of emerging issues, trends and evolving regulatory requirements; participate fully as member of the team, provide thought leadership in role and to the team

Job Requirements:

- Undergraduate degree with over 5 years of industry experience
- Working towards completion of Canadian Securities Course (CSC)
- Working towards fulfillment of Trust and Estate Practitioner (TEP) designation is an asset
- Professional designations such as MBA, CA, LLB, CFA (or other) desirable

- Ability to work collaboratively and communicate effectively

To Apply, visit our Career Website: https://jobs.td.com/en-CA/jobs/13340469/trust-officer-nanaimo-ca/