Job Title: Wills & Trust Resource Consultant

What is the opportunity?

As a member of the Wills and Trusts Resource Group (WTRG) under the Professional Practice Group, the Wills and Trusts Resource Consultant will be part of the principal resource facility providing technical assistance, analysis and recommendations to Canadian Wealth Management partners on estate, trust account, incapacity and disbursement issues. The position will support revenue generation through retention of funds by improving the client experience on estate settlements, the opening of new trust accounts and will help minimize risk and promote consistency in business practices across Canadian Wealth Management. For more information, please visit: https://royaltrust.rbcwealthmanagement.com/en

Please Note: This position can be located anywhere in British Colombia as the individual will be working remotely.

What will you do?

- Critically analyze all estate and trust documentation received from the business related to the opening or change to an estate or trust account to identify issues and to provide a standardized summary of relevant information for the ongoing use by the business, utilizing knowledge of relevant jurisdictional laws and principles (Canadian common law)
- Research and analyze estate, incapacity, and trust issues raised by the Canadian Wealth Management operational business units
- Make reasoned and informed recommendations to the business with the Senior Manager relating to the support of trust, estate, joint accounts, and incapacity issues, including but not limited to proper disbursements, succession of trustees, issues related to registered plans, disputes and complaints regarding a specific account, and all related issues surrounding trust and estate accounts
- Review waiver of probate exception requests and provide a risk analysis and recommendation summary to the business
- Prioritize escalation of estate, trust account and incapacity issues based on urgency of issue to provide timely recommendations
- Identify business and legal risks on accounts escalated to the Wills & Trusts Resource Group and escalate to the Senior Manager and to the appropriate resource function
- Play an active role in developing relationships with business partners and providing a positive client experience

What do you need to succeed?

Must Have

- Law degree from common law university (LL.B., J.D., B.C.L./LL.B., LL.L., LL. M.)
- 2+ years' experience in the estate and trust industry
- Ability to work well independently as well as in a team environment
- Strong interpersonal skills, time management skills and ability to work under pressure
- Excellent written, verbal and electronic communication skills
- Exhibits sound judgment and problem solving skills
- Demonstrated ability to self manage, think independently and analyze complex issues
- Willingness to participate in continued learning of common law estate, trust and incapacity concepts and principles

Nice to Have

- Trust designation preferred (MTI or TEP)
- Bilingual French

What's in it for you?

We thrive on the challenge to be our best, progressive thinking to keep growing, and working together to deliver trusted advice to help our clients thrive and communities prosper. We care about each other, reaching our potential, making a difference to our communities, and achieving success that is mutual.

- A comprehensive Total Rewards Program including bonuses and flexible benefits, competitive compensation,
- commissions, and stock where applicable
- Work in a dynamic, collaborative, progressive, and high-performing team
- Opportunities to do challenging work
- Opportunities to take on progressively greater accountabilities

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