RAYMOND JAMES

SENIOR TRUST ADVISOR

Vancouver BC

Job Posting # 2102446

Raymond James Trust Canada (RJTC) is seeking qualified Senior Trust Advisor.

Raymond James Trust (Canada) is a newly acquired subsidiary of Raymond James Ltd. (RJL), Canada's leading independent investment dealer offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs. RJTC provides personal estate, trust and agency services to clients of Raymond James Ltd. and its correspondent advisors.

Job Summary

Reporting to the CEO, the Senior Trust Advisor will be a key member of our Trust team responsible for the delivery of estate and trust solutions in their local region. The successful candidate will be engaged in business development strategies to drive partnership with our Raymond James financial advisors to leverage the Trust offering for their clients. You are a goal oriented team player capable of acting as lead relationship manager in a dynamic work environment for a growing trust business. Managing a book of estate and trust accounts you will ensure the ongoing delivery of premium service to our partners and their clients while simultaneously building and maintaining strong relationships with Raymond James partners.

Essential Duties and Responsibilities

- Building strategic relationships with Raymond James Advisors with the goal of enhancing their knowledge and willingness to work in collaboration with our Trust business for the benefit of their HNW clients;
- Partnering with Raymond James advisors to meet with their HNW clients and prospects, demonstrating the value of our holistic wealth offering and identifying opportunities to assist clients with their Estate planning needs through the use of our Trust solutions;
- Delivery of RJT estate planning, trust and estate advice including collaborating with clients' lawyers and other external advisors to ensure the timely execution of wills, trust deeds and agency agreements;
- Develop and strengthen relationships and build new relationships with clients, partners, centers of influence with the goal to enhance networking opportunities and new business engagement for the Trust Company;
- Conduct skill builds, client and partner presentations, webinars to enhance the knowledge and understanding of the Estate and Trust offering to our internal and external partners;
- Responsible for the delivery/oversight of timely, accurate, and professional administration of complex estates, trust and power of attorney accounts, as well as fee-based estate trustee and trustee support services;
- Maintain up-to-date knowledge and understanding of Trust and Estate Laws, common law and other relevant legislation, case law, and internal policies and procedures;
- Properly exercise the discretion afforded in the will, trust agreement or power of attorney document for clients where the trust company has been granted authority;
- Manage account-owned corporations, which may include director's resolutions, shareholders' meetings, coordinating the preparation of financial statements, etc., ;

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- Proactively identify and resolve account issues while adhering to all internal policies and procedures;
- Recognize when the business risk identified may require external legal counsel and promptly escalate the matter up to the President;
- Liaise with compliance, operations, legal and other related lines of business to resolve system, administrative, risk management and legal issues pertaining to the administering of accounts; and
- Other duties and projects as assigned.

Knowledge, Skills, and Abilities

Knowledge of

- Fundamental investment concepts, practices, and procedures used in the securities industry; and
- Provincial estates, trusts, and powers of attorney for property laws across Canada.

Skill in

- Critical and analytical thinking so as to identify and resolve diverse, complex, and ambiguous issues in a timely and practical manner; and
- Microsoft Office with a willingness and ability to learn new applications.

Ability to

- Work within deadlines in a high-volume and demanding environment while maintaining a high level of service and an imperative attention to detail;
- Demonstrate advanced face-to-face, email, videoconferencing, and telephone etiquette and relationship management skills;
- Work independently as well as collaboratively within a team environment;
- Demonstrate a professional manner to establish and maintain effective working relationships at all levels of the organization;
- Exercise tact and discretion in the handling of confidential information; and
- Communicate proficiently in French is an asset.

Educational/Previous Experience Requirements

- A university degree;
- A minimum of 3 years in the Estate and Trust related business;
- Technical proficiency related to wealth planning strategies such as insurance, philanthropy, taxation;
- Experience in estate, trust or financial planning;
- Experience working with HNW clients and their wealth advisors; and
- Experience managing Estate, Trust & Power of Attorney accounts is an asset.

Licenses/Certifications

- STEP or MTI designation is an asset.

Travel

- Intra-provincial travel may occasionally be required.

Raymond James Guiding Behaviors

At Raymond James Ltd, our associates use five guiding behaviors (Develop, Collaborate, Decide, Deliver, and Improve) to deliver on the firm's core values of client-first, integrity, conservatism and independence.

We expect our associates at all levels to:

- Grow professionally and inspire others to do the same;
- Work with and through others to achieve desired outcomes;
- Make prompt, pragmatic choices and act with the client in mind;
- Take ownership and hold themselves and others accountable for delivering results that matter; and
- Contribute to the continuous evolution of the firm.

If you would like to join our team, please apply on the following link at the soonest:

https://raymondjames.taleo.net/careersection/1_ca/jobdetail.ftl?job=2102446&tz=GMT-07%3A00&tzname=America%2FLos_Angeles

Human Resources
Raymond James Ltd.

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.

We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at resumes@raymondjames.ca.