

About clearEstate:

Backed by leading Fintech investors, Diagram & Portag3 Ventures; **ClearEstate** is an early stage start-up that is building the next-generation of full end-to-end solution for estate execution.

In North America alone, there are 3M deaths per year and \$65T of value to be transferred in the next 25 years; yet, the average executor is largely abandoned by current incumbents. We are changing this, by offering a tech-enabled end-to-end solution for estate settlement serving mass-market executors.

ClearEstate's mission is to disrupt traditional business models and empower underserved executors. Our vision is to build tech enabled solutions & services to become an integrated financial services provider in the estate planning and execution space.

About the role:

To achieve our goals, we are looking for an experienced **Trust Officer / Wills Legal Professional** to join our professional operations team and help us build our estate settlement product. This person will be working with all the co-founders, reporting to our Director of Professional Operations and will play a critical role in the company's success.

Key responsibilities:

Estate settlement processing:

- Draft estate settlement documents;
- Support executor duties with key forms to be filled and submitted;
- Provide probate & estate administration support;
- Communicate with government agencies, financial institutions and any other stakeholder;
- Perform legal research;
- Assist in asset evaluation;
- Act as the single point of contact to executors with other professionals (notary, lawyers, tax accountants, etc);
- Assist clients through difficult times.

Product and operations:

- Support the product team to build our estate settlement and planning product;
- Act as a Subject Matter Expert to the product team to improve the quality of the ClearEstate platform;
- Test functionalities and provide feedback to the product and development teams;
- Draft operational manuals and workflows to develop ClearEstate's operating standards;
- Create and use templates for communicating with various stakeholders.

What we are looking for:

- Trust Officer with 3-5 years experience in Wills & Estate;
- Licensed paralegal in Ontario or any other Canadian province (in good standing), an asset;
- STEP or MTI certification in Estates and Trust administration an asset;
- Solid understanding of estate tax rules for specific jurisdictions;
- Strong organizational skills;
- Good communicator & interpersonal skills;
- Ability to manage client relationships;
- Fluent in French, an asset;
- Willingness to embrace technology and disrupt the field of estate law.

What we offer:

- The opportunity to be a part of something big and impactful at the confluence of fintech and legaltech;
- Competitive salary + extensive benefits plan;
- Flexible remote work policy - during and after COVID;
- Allowance for fitness program of your choice (\$50 per month)
- A strong work-life balance with paid vacation and flex days;
- Regular team-bonding activities;
- Skill development opportunities and a culture of growth mindset;

To apply, you can send your resume via email to: talent@clearestate.com

ClearEstate respects individual differences and guarantees equal opportunities and inclusion. Therefore, all applications are treated equally and recruitment is based solely on skills and experience.