

Scotiabank is hiring a Legacy Officer!!

Purpose

Contributes to the overall success of the Scotiabank's Philanthropic Advisory Services in Canada ensuring specific individual goals, plans, initiatives are executed / delivered in support of the team's business strategies and objectives. Ensures all activities conducted are in compliance with governing regulations, internal policies and procedures. Scotiabank is the administrative agent of Aqueduct Foundation, a Canadian public foundation with donor advised funds.

Accountabilities

- Manage estate and life insurance administration related to legacy funds, under the direction of Sr. Manager, Finance and Operations, for Aqueduct Foundation.
- Manage relationships with existing legacy donors (clients who have named Aqueduct Foundation in their estate plans), under the direction of Market Lead, Aqueduct Foundation and Philanthropic Advisory Services. Responsible for proactive communication, updating fund deeds, coordinating estate planning and supporting lifetime donations to activate funds.
- Manage funded legacy funds granting in accordance with Aqueduct Foundation policy and procedures.
- Builds and maintains effective internal and external partnerships.
- Limits exposure by ensuring that account administration is carried out proactively and in compliance with defined policies/ procedures.
- Maintains expert knowledge of legislative, administrative and economic issues that impact the management of legacy fund accounts and demonstrate an ability to communicate on a broad range of legal and financial issues with donors and their advisors, with particular proficiency in estates, trusts, wills, investment and taxation matters.
- Understands how the Bank's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Actively pursues effective and efficient operations of their respective areas in accordance with Scotiabank's Values, its Code of Conduct and the Global Sales Principles, while ensuring the adequacy, adherence to and effectiveness of day-to-day business controls to meet obligations with respect to operational, compliance, AML/ATF/sanctions and conduct risk.
- Champions a high performance environment and contributes to positive and inclusive work environment.

Education / Experience / Other Information

- Professional and/or industry accreditation, in addition to a university degree.
- Minimum of 5-7 years of directly-related experience in trust and estate or charitable gift planning.
- Experience with high net worth client and their advisors.

- Entrepreneurial and capable of consistently delivering a proactive best-in-class client experience.
- Effective at building and maintaining deep relationships and partnerships.
- Proven ability to manage competing priorities without losing focus on key accountabilities
- Strong interpersonal, verbal communication and negotiation skills and professionalism.
- Deep understanding of the trust and wealth management landscape and a demonstrated ability to work in an environment that demands tact, objectivity and sensitivity.
- Strong change management skills and ability to adopt technology and reporting platform changes to support operational improvements, sales management process improvements, etc.

Working Conditions

Work in a standard office-based environment; non-standard hours are a common occurrence. Limited travel domestically. Based in Vancouver.

Please apply directly to the posting at this link:

<https://career17.sapsf.com/sfcareer/jobreqcareer?jobId=122361&company=scotiabank>