TD Description

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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 excel in managing a growing client base and complex Private Trust activities and referrals? Then this is the job you are looking for. As **Executive Trust Officer**, you will provide ongoing relationship management to clients, receive new client referrals and service the most complex files. Key to your success in this role is building relationships with clients, beneficiaries and co-trustees.

In addition, you will:

- Handle existing strategic accounts and opportunities that represent the business segments' largest accounts and assist with business development
- Facilitate the integration of Trust products by clearly understanding client evolving needs and circumstances
- Work autonomously as the lead as well as closely with business partners to coach, guide and ensure all Trust needs are identified and fulfilled

- Solve problems and may lead others to solve or structure deals that are complex in nature
- Handle client referrals seamlessly between Private Trust to the Wealth Advisor
- Actively manage all other relationships within and across various business lines to ensure controls and alignment with enterprise and regulatory requirements; maintain risk management
- Build comprehensive advice plans for clients through integrated knowledge of the Bank's other areas and strategy
- Uphold relationship management of the largest and technical client accounts
- Exercise care, judgment and discretion involving a range of account management needs including tax, investment, administrative services and partner documentation
- Anticipate, identify and interpret emerging issues, market trends and evolving regulatory requirements to apply this knowledge to serve clients' needs
- Participate fully as member of the team and provide thought leadership

Job Requirements

- Undergraduate degree with over 8 years of relevant work experience
- Canadian Securities Course (CSC)
- Trust and Estate Practitioner (TEP) designation
- Professional designations such as MBA, CA, LLB, CFA (or other) desirable
- Substantial knowledge in a complex field as well as of broader related areas
- Strong communication skills with ability work collaboratively and independently

Inclusiveness

At TD, we are committed to fostering an inclusive, accessible environment, where all employees and customers feel valued, respected and supported. We are dedicated to building a workforce that reflects the diversity of our customers and communities in which we live and serve. If you require an accommodation for the recruitment/interview process (including alternate formats of materials, or accessible meeting rooms or other accommodation), please let us know and we will work with you to meet your needs.

Job Family: Private Trust
Job Category – Primary: Wealth Management

Business Line: TD Wealth
Time Type: Full Time
Employment Type: Regular

Country: Canada
Province (Primary): Quebec
City (Primary): Montreal
Work Location: 1350 Rene-Levesque Blvd Corporate

To apply to the position, please send your CV directly to Natasha Sidarous at Natasha.sidarous@td.com