

Trust Officer

What You'll Be Doing

As the Trust Officer, you will be responsible for the ongoing account management and administration of Estates, Trusts and Powers of Attorney. This involves partnering with a specialized team of professionals within Wealth Management dedicated to working with Estates, Trusts and Powers of Attorney. Primary accountability for the timely, accurate, and professional administration of moderate complexity estate, trust and power of attorney accounts. You will identify and mitigate account risks while adhering to all CIBC Trust Policies & Procedures, including cash management, fee collection, account opening, etc. Details on your work arrangement (proportion of on-site and remote work) will be discussed at the time of your interview.

This role can be performed out of Alberta or British Columbia.

How You'll Succeed

- **Collaboration** – Develop and maintain a strong partnership with the clients/beneficiaries in order to provide excellent client service. Effective and open communication is critical to ensure parties are informed of key activities, milestones and deliverables. Partner effectively with internal experts from the Investment Management and Tax Department, to provide oversight and guidance on client investment and tax issues. Engages external professionals as required. Supervises account investments to ensure consistency with account objectives, constating documents and legislation.
- **Trust & Estate Acumen** - Ensure the onboarding and account management aligns with the unique needs of clients and the characteristics of Estates and Trust. Establish effective tracking, monitoring and compliance with the governing document and responsible for the resolution of all operational, technical and discretionary issues encountered in the management of the accounts. Assist in developing standards in administration and vetting new and/or changes to policies and procedures. Optimizes account administration by identifying and implementing process improvements.
- **Coaching and Mentoring** – Accountable to oversee and supervise the workflow of a Trust Administrator by providing ongoing technical assistance to support the achievement of the business unit's priorities and CIBC's overall goals. Create a positive work environment and be an effective role model by championing CIBC's mission, vision and values. Ensure compliance with policies, standards, guidelines and controls by applying the policies and controls fairly and consistently.

Who You Are

- **You can demonstrate 4 - 8 years of experience in the Estate & Trust Industry.** A detailed knowledge of accounting and investing sufficient to administer a range of moderately complex Estate, Trust and Power of Attorney Accounts.
- **You're a certified professional.** It is an asset if you have obtained the Member Trust Institute (MTI) and/or Trust and Estate Practitioner (TEP) designation(s).
- **Your influence makes an impact.** You know that relationships and networks are essential to success. You inspire outcomes by making yourself heard.
- **You give meaning to data.** You enjoy investigating complex problems, and making sense of information. You're confident in your ability to communicate detailed information in an impactful way.
- **You're driven to succeed.** You are motivated by accomplishing your goals and delivering your best to make an impact.
- **Values matter to you.** You bring your real self to work and you live our values – trust, teamwork and accountability.

What CIBC Offers

At CIBC, our people are our greatest asset. You'll become part of a diverse community that acknowledges everyone's unique talents, and empowers teams to do what's right for the client, and

to do it well. As part of our team, you will:

- **Thrive:** Benefit from an open and approachable culture that provides the flexibility and support you need to integrate your life at work and at home
- **Connect:** Work in a place where the right technology and infrastructure fosters innovation, collaboration and creativity
- **Develop:** Grow your skills and career through our best-in-class onboarding experience, ongoing learning opportunities, individual development planning, and comprehensive product training
- **Prosper:** Share in our collective success with a competitive salary, incentive pay, banking benefits, health benefits program, and employee share purchase plan

How to Apply:

https://cibc.wd3.myworkdayjobs.com/search/job/Calgary-AB/Trust-Officer_2132564-1