

Trust Administrator

Job Description:

Provides high quality sales and service to Trust & Estate clients to deliver an exceptional client experience. Provides technical expertise for all aspects of Trust & Estate account management and administration to ensure compliance. Works collaboratively within the branch and the regional team as part of the client/relationship management solution. Identifies and makes referrals to other business groups as appropriate.

Responsibilities:

- Assists in preparing new business proposals or presentations to clients/prospects based upon their needs.
- Develops a rapport and instills confidence with the client to develop credibility as a member of the client / relationship team.
- Develop and maintain knowledge and understanding of integrated services and offerings, with a focus on Trust and Estate products and procedures.
- Coordinates and executes specific activities for the implementation of strategic initiatives; includes tracking metrics and milestones.
- Collaborates with internal and external stakeholders in order to deliver on business objectives.
- Performs set up & maintenance of Trust & Estate accounts ensuring all compliance requirements are met within acceptable time frames.
- Ensures the timely and accurate processing of trade order management activities.
- Supports in audits and compliance reviews as assigned.
- Identifies and escalates all irregularities and discrepancies to management.
- Performs sales & service support activities as required to meet client needs and maintain overall service levels.
- Provides administrative support to team members and relationship managers that includes financial reports, asset & account reconciliation, compliance, trade activity, posting, fee collection and other related activities; ensures proper documentation and administration decisions.
- Meets high-quality service standards to maximize relationship retention and growth.
- Develops rapport and instills confidence with the client to develop credibility and earn their trust.
- Follows through on the risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, act in their best interests, and ensures an effectively run function.
- Protects the Bank's assets and complies with all regulatory, legal and ethical requirements.
- Completes complex & diverse tasks within given rules/limits and may include handling escalations from other employees.
- Analyzes issues and determines next steps.
- Broader work or accountabilities may be assigned as needed.

Qualifications:

- Typically between 2 - 3 years of relevant experience and post-secondary degree in related field of study desirable or an equivalent combination of education and experience.
- Basic knowledge of Estate and Trust products and services.
- Trust industry experience.
- Applicable securities certification.
- Specialized knowledge.
- Verbal & written communication skills - Good.
- Organization skills - Good.
- Collaboration & team skills - Good.
- Analytical and problem solving skills – Good.

How to Apply:

https://bmo.wd3.myworkdayjobs.com/External/job/Ottawa-ON-CAN/Trust-Administrator_R210028340