

Job Title: Senior Trust and Estate Officer

About Cidel

Cidel is a global financial services group that designs and implements customized financial solutions to help clients build, preserve and transfer wealth. With a strategic network of operations in Canada and internationally, Cidel's broad range of investment, trust and structuring capabilities provides clients with solutions that are global, innovative, transparent and compliant. In the world of private banking and trust, Cidel is recognized as a dedicated, high calibre advisor with exceptional, longstanding relationships.

Cidel Trust Company is a federally regulated trust company and part of the Cidel group of companies. Cidel Trust Company acts as a corporate trustee for a wide range of high net worth individuals and corporate clients. We are currently looking for experienced and qualified candidates to fill a Senior Trust and Estate Officer role in our Calgary, Alberta office.

Position:

Full time Senior Trust and Estate Officer


What We Offer:

This is an opportunity to join a rapidly expanding global wealth management firm with lots of "room to grow" and help shape the trust team. The right candidate will have a direct impact on the business and his/her input will be welcomed at all levels of the organization.

Responsibilities:

The senior trust officer will be responsible for the efficient administration of a book of trusts, estates and related entities. The trust officer must ensure that structures are administered in accordance with the governing laws, always cognizant of Cidel Trust Company's responsibilities to its clients and the potential risks to the trustee. Key responsibilities will include:

- To ensure the day-to-day administration of trusts and estates with familiarity of the Trust document and Trustee's power and responsibility under the Deed and the Trustee Act, and all other laws governing the Trust.
- To undertake annual reviews of Trusts and to ensure that any matters raised pursuant to the review are addressed in a timely and efficient manner.
- To review financial statements on behalf of Trusts assigned.
- To review and draft Trust documentation and any other related documentation.
- To ensure strict adherence with internal guidelines, policies and procedures.
- To ensure the setup of trusts on the company's internal system, the creation of invoices, the posting and maintaining of accurate information to ensure the timely and correct posting of all invoices.
- To keep records of transactions, processing transactions and have a basic knowledge of accounting entries.
- To liaise with Wealth Consultants and assist with the implementation of new entities.
- To provide timely response to clients, group offices and third parties.
- To liaise with other professionals.
- To liaise with regulatory and tax authorities on audits or as otherwise required.
- To review and file tax returns.
- To undertake any other duties as appropriate within your competence, which may be required by the assigned manager from time to time so as to ensure optimum desired results are achieved by Cidel Trust Company and Cidel.



Qualifications and experience:

- Over 8 years of relevant trust and estate administration experience (experience with charitable trusts is a nice-to-have but not required)
- Post secondary education is preferred
- STEP accreditation
- Strong computer skills
- Strong communication and interpersonal skills

Personal Attributes:

The right candidate will be assessed based on the following criteria:

- Professional attitude
- Friendly demeanor
- Collaborator in a team environment
- Quick learner
- Resourceful thinker

We welcome and encourage applications from people with disabilities. Reasonable accommodations are available on request for candidates taking part in all aspects of the selection process.

To apply, please submit your resume to Megan Duncan at mduncan@cidel.com