
Proposed Title: Estate and Trust Specialist, Quebec / Scotiabank / MD Private Trust

Purpose

- As a member of the Trust Leadership team, the Estate and Trust Specialist contributes to the overall success of Scotiabank and MD Private Trust in the province of Quebec ensuring goals, plans, initiatives are executed / delivered in support of the Trust business strategies and objectives. Ensures all activities conducted are in compliance with government regulations, internal policies and procedures.
- The Estate and Trust Specialist, Quebec is responsible for overseeing execution of the business strategies that align with the complex legal product offerings at Scotiabank and MD Private Trust in the context of the unique market conditions, processes and regulations to be followed in Quebec. The incumbent will also provide Scotiabank and MD Private Trust representation for the learning requirements required by our French speaking SWM partners.
- The individual is responsible for leading a portfolio of cross business line projects which include short-term and long-term initiatives as they apply to the province of Quebec. The incumbent will ensure business strategies, plans and initiatives are executed and delivered on schedule, on budget, and in compliance with governing regulations, internal policies and procedures.
- The incumbent is expected to possess a significant level of knowledge/communication skills to identify, evaluate and recommend courses of action that improve the customer experience and employee engagement in Quebec.
- As the leading trust and estate Quebec expert, the incumbent, will act as a technical coach for MDPT and Scotiabank officers, advisors, specialists and staff. The incumbent will support business development initiatives providing Scotiabank and MD Private Trust with Quebec specific training.

Accountabilities

- Champion a customer focused culture to deepen client relationships and leverage broader Bank relationships, systems and knowledge.
- Participate in integrated National Office cross-functional teams on strategic planning and prioritization of initiatives/complex projects that will directly contribute to short and long-term business goals in Quebec.
- Build and implement processes for and provide strategic direction on; initiatives within Scotiabank and MDPT to drive operational optimization, profitability and revenue growth in the Quebec market.
- Implement new products and offerings in line with the regulations of the Civil Code of Quebec and the Code of Civil Procedures to further the Trust business strategic plan.
- Proactively identify and recommend improvements to operational efficiencies and the quality of deliverables with the view of continued development of processes to analyze, report, and escalate as needed.
- Conduct research and trend analysis to identify opportunities for innovation, diversification, business and revenue growth.
- Partner with Senior Legal Counsel to ensure that Quebec Civil Law rules and regulations are respected.
- Research, develop and present trust and estate concepts across MDPT and Scotiabank as well as internal partners to promote education and sales, attract new clients, and provide support to the MD and SWM strategic plan.

- Provide expertise concerning trust and estate related subject matter to MDPT and Scotiatrust Quebec advisors, specialists and officers. This includes partnering with Managers, National Leads, Team Leads and Directors to provide estate and trust guidance, technical coaching, and training.
- Work with individual MDPT and Scotiatrust Quebec staff to enhance their knowledge of, and effectiveness in delivering trust and estate solutions.
- Provide expertise with respect to Quebec legislation and regulations; supporting compliance and oversight function including litigation oversight and discretionary decision making to ensure the business is in line with requirements.
- Provide expertise and guidance to MD Estate Services Group on Quebec specific matters
- Collaborate with marketing and communication to provide Quebec tailored content, business development resources and tools to clients and partners within MDPT and Scotiatrust. This includes editing and/or contributing to client facing collateral written to showcase the trust and estate Quebec offering.
- Keep abreast of legislative and administrative changes and trends. Assess the impact of changes in trust and estate legislation on services and products, and provide recommendations to determine changes needed to ensure compliance with the Civil Code of Quebec, the Code of Civil Procedures and/or any other relevant legislation. Be proactive in informing MDPT and Scotiatrust staff of pending changes and how such changes may affect client affairs.
- Support the onboarding, orientation, development and training, and continuing education of Quebec Trust employees.
- Support the managers, leads and directors in developing and executing a meaningful employee development plan and succession planning.
- Understand how MD and Scotiabank's risk appetites and risk cultures should be considered in day-to-day activities and decisions.

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Reporting Relationships (Job Titles only)

Primary Manager: <i>(include secondary Manager if applicable)</i>	<ul style="list-style-type: none"> • MD National Lead, Private Trust • Secondary - National Director, Trust Strategic Initiatives / Scotiatrust / MD Private Trust
Direct Reports:	<ul style="list-style-type: none"> • None
Shared Reports (solid/dotted if applicable):	<ul style="list-style-type: none"> • None
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Dimensions

- Supporting MDPT and Scotiabank Québec Staff, which includes approximately 26 professionals, specialists and support staff
- Collaborating with Scotiabank/MD Private Trust Leadership team (approximately 20)
- Providing expertise and guidance to MD Estate Services Group on Quebec specific matters
- Relevant specialists include: Estate and Trust Advisors, Regional Trust officers, Trust Officers
- Responsible for building and managing external relationships with centers of influence in various related fields
- Provide expertise with respect to Quebec legislation and regulations; supporting compliance and oversight function including litigation oversight and discretionary decision making to ensure the business is in line with requirements.

Education / Experience / Other Information (include only those that are specific to the role)

- Law degree (LL.B.) and a member in good standing of the Chambre des Notaires du Quebec or the Quebec Bar Association
- Society of Trust and Estate Practitioners (STEP) designation (TEP)
- Minimum 10 years of relevant experience in the estate and trust industry
- University degree or equivalent
- Knowledge of the estate and trust Quebec industry and regulatory environment
- Previous experience working with lawyers, advisors and trust professionals
- Ability to speak and write in French and English

Functional Competencies:

- Thorough knowledge of Quebec's Trust and Estate Industry.
- Thorough knowledge of estates, trusts, wills, estate planning, income tax and investments so as to be effective in providing leadership and guidance in risk management, implementation of policy, quality control processes and in determining appropriate action for the resolution of problems and concerns;
- Ability to work collaboratively with other stakeholders.
- A high degree of flexibility is required to adapt to a wide variety of tasks and functions;

Working Conditions

- Work in a remote home-based office environment, or in local branch office. Moderate travel domestically may be required

To apply on this position, click on this link: <https://jobs.scotiabank.com/job-invite/146148/>