



Trust Officer / Executive Trust Officer – Indigenous Trust Services

Department Overview :

Private Wealth Management (PWM) Private Trust (PT) provides a full range of Trust services to clients including Individuals, Corporations, First Nations, Metis, Inuit (individuals, Governments and Businesses) and Charitable entities with a focus on building long lasting relationships. Private Trust ensures protection of their assets and careful and responsible administration and management of their financial plans.

The Trust Officer/Executive Trust Officer – Indigenous Trust Services (ITS), acting as a specialist in trust administration, manages accounts for the Indigenous client segment, while delivering legendary client experience. The Trust Officer/Executive Trust Officer Indigenous Trust Services works jointly on complex accounts where required with senior members of the Indigenous Trust Services team. Has an opportunity to work in a fast growing and very rewarding environment with other like-minded professionals.

This role includes building and maintaining long term relationships with Member Trustees, Chiefs and Councils or other Indigenous Government structures, their Business entities as well as their financial and/or legal advisors. The role is also accountable for promoting TD Wealth's Indigenous Trust capabilities to Centres of Influence (COIs) and identifying further client needs or new opportunities from both within the existing client base or externally where possible. While the focus of this role is to manage Indigenous Trust accounts, this role may also be required to introduce and facilitate comprehensive Wealth Management solutions by clearly understanding the evolving needs and circumstances of their clients and by working closely with their business partners to ensure all financial needs are identified and fulfilled.

The Trust Officer progresses to more senior levels by demonstrating ability to manage larger number and complexity of accounts, assuming greater decision-making authority, sharing expertise through formal training and mentoring.

The Trust Officer role reports into the Regional Trust Manager. Assigned region will require travel mainly within the Prairies and North West Territories, including Alberta, Saskatchewan, Manitoba and Northern Ontario.

Work location: Winnipeg, Saskatoon or Regina

Job Description :

Customer Experience & Community Involvement

Business Results & Operations:

- Be involved in the community and support TD Bank charity and community initiatives
- documents
 - Anti-Money Laundering
 - Product Policies
 - PT Policies
- Demonstrate our commitment to being a customer-centric organization that puts customers first by ensuring legendary service & advice is provided during every customer interaction to maximize retention and growth.
- Exercise judgment in discretionary matters;
- Ensure tax and administrative services provided by internal partners are carried out as required.
- Remain in contact with investment managers, and other professionals such as accountants and/or lawyers as required.
- Ensure all new clients are welcomed in accordance with ITS policies and procedures
- Deliver high caliber professional presentations

Development & Teamwork:

- Support growth of the ITS book of business by acting as a specialist resource for Private Trust, Indigenous Trust Services.
- Actively manage a book of complex Indigenous Trust accounts.
- Ensure trust administration is carried out in accordance with the Trust Agreement and all other governing.
- Ensure full understanding of ITS policies and procedures.
- Identify opportunities for referral to TD Bank Business Partners.
- Protect the interests and reputation of TD Bank and our clients through proactive and continuous compliance with industry regulations and TD/PT policies and procedures, including but not limited to:
 - Ensure ongoing awareness and understanding of ITS policies and procedures
 - Integrate compliance activities into normal client interactions
 - Participate in all required training sessions
 - Provide advice and guidance to other Trust professionals (including mentoring as well)

- Work collaboratively with all partners to achieve mutual goals
- Foster and contribute to a positive, inclusive and constructive work environment with a focus on supporting the PT and PWM team
- Seek opportunities to gain further knowledge in all areas related to working with Indigenous Communities
- Keep abreast of current events relevant to this client base as well as changes in legislation

Job Requirements :

Required:

- Undergraduate Degree or equivalent
- Trust Officer designation or willingness to complete
- Canadian Securities Course

Preferred:

- Completion of ICB courses
- Trust Officer designation or TEP – Trust & Estate Practitioner
- Professional Designations such as MBA, CA, LLB, CFA etc.

Additional Information :

Required:

- Experienced and proficient knowledge of Trust Administration
- Proven client relationship management
- Demonstrated strong judgment and management of risk when applying discretionary authority
- Excellent presentation skills – able to communicate often complex and technical matters in an appropriate fashion including possible conflict resolution
- Strong, personal integrity and credibility
- Strong attention to detail
- Able to work both independently and as part of a team
- Able to travel by air, water or vehicle to areas mainly within the Prairies or NWT, Northern Ontario and including remote locations.
- Travel may be required outside of normal business hours as needed.

Preferred:

- 5-7 years of experience
- Reasonable knowledge of taxation and investment strategies.

- Familiarity and comfort in working with Indigenous Communities is preferable

To Apply:

<https://jobs.td.com/en-CA/jobs/15602754/trust-officer-executive-trust-officer-indigenous-trust-services-winnipeg-ca/>