



Job Purpose

As a Trust Officer working in a Scotia Wealth Management office, you are a trusted and experienced relationship manager supporting the company's strategy and revenue goals by profitably delivering a best in class client experience in accordance with your clients' needs and expectations and in compliance with policies and procedures. You also assist with the identification and pursuit of new business opportunities, both inside and outside Scotia Wealth Management.

You are client-centric with a strong sense of proactivity and are effective at building and maintaining deep client relationship and possess detailed technical knowledge of Estates & Trusts. Supporting a Senior Trust Officer and an account portfolio of varying size and complexity, you will have primary responsibility for the day to day management, oversight and account administration for client, beneficiary and Co-Trustee relationships.

Through an intimate understanding of client goals, needs and circumstances, you will assist the Senior Trust Officer with engaging Scotiabank and Scotia Wealth management's team of experts as needed, to deliver on total wealth strategies.

Key Accountabilities

1. Relationship Management & Client Service

- Provide a best in class, proactive and personalized client experience to high net worth clients and beneficiaries, exemplified by timely and accurate account administration coupled with demonstrated technical expertise, personal integrity and an ability to respond to stated and unstated client needs and concerns.
- Assist the Senior Trust Officer in building and maintaining effective internal and external partnerships, with a view to providing seamless, impactful solutions across a variety of financial services disciplines.
- Assist the Senior Trust Officer with revenue collection and contribute to the branch's profitability by assisting with accurate forecasting and the timely collection of fees, including making recommendations regarding situations that may warrant a non-standard fee agreement.

2. New Business Development

- Identify and elevate to the Senior Trust Officer, new business opportunities that arise from the day to day management of the account portfolio
- Assist the Senior Trust Officer in their efforts establish a strong presence and proactive relationship with a select number of retail branches to identify and close immediate and recurring fee opportunities.
- Assist the Senior Trust Officer develop acquisition strategies and maintain a robust prospect pipeline, in order to generate sustainable and profitable growth.

3. Risk Management

- Limit corporate risk exposure by ensuring that account administration is carried out proactively and in compliance with defined policies/procedures and audit standards, including the timely escalation of issues to the appropriate internal oversight groups as required.
- Maintain detailed knowledge of legislative, administrative and economic issues that impact the management of your accounts and demonstrate an ability to communicate on a broad range of legal and financial issues with clients and their advisors, with particular proficiency in estates, trusts, wills, and investment and taxation matters.

4. Additional Accountabilities

- Champions a customer focused culture to deepen client relationships and leverage broader Bank relationships, systems and knowledge.
- Understand how the Bank's risk appetite and risk culture should be considered in day-to-day activities and decisions.
- Actively pursues effective and efficient operations of his/her respective areas, while ensuring the adequacy, adherence to and effectiveness of day-to-day business controls to meet obligations with respect to operational risk, regulatory compliance risk, AML/ATF risk and conduct risk, including but not limited to responsibilities under the Operational Risk Management Framework, Regulatory Compliance Risk Management Framework, AML/ATF Global Handbook and the Guidelines for Business Conduct.
- Champions a high performance environment and contributes to an inclusive work environment.

Functional Competencies

- Proven ability of consistently delivering a proactive best in class client experience.
- Proven ability to manage competing priorities without losing focus on key accountabilities
- Strong interpersonal, verbal communication and negotiation skills and professionalism.
- Strong change management skills and ability to adopt technology and reporting platform changes to support operational improvements, sales management process improvements, etc.
- Effective at building and maintaining deep relationships and partnerships.
- Proven ability to execute against financial and business development targets and profitability measures.

Education/ Experience

- Professional and/or industry accreditation, in addition to a university degree.
- Minimum of 3-5 years of directly-related experience.
- Proven success in high net worth client relationship management.
- Membership or commitment to participate in CSI and/or STEP.

Interested candidates should direct applications to:

<https://career17.sapsf.com/sfcareer/jobreqcareer?jobId=69303&company=scotiabank&username=>