

How You Will Contribute:

Reporting to the Manager, Regional Trust Officers, you will be accountable for building trusted relationships with client to facilitate the administration of activities associated with estate and trust settlement. You will proactively manage relationships with family members and others during the settlement of deceased clients' estates, ensuring transparency and comprehension of required activities. You will also network and promote MDPT services to MD Management and beneficiaries to identify new business opportunities for MD.

Relative to **Estate Administration**, you will:

- Met with beneficiaries/co-executors/co-liquidators to obtain key documentation required to facilitate estate settlement and ensure regular and proactive communication to all key parties throughout the settlement process.
- Complete an initial assessment of requirements for safeguarding and appraisals for real estate, household items and personal effects.
- Review initial estate documentation and related forms ensuring thoroughness, accuracy, and consistency to be forwarded to Central Administration (Home Office) to commence with administration activities.
- Follow relevant provincial legislation and MD policy during estate settlement process.
- Identify matters requiring the exercise of executor/trustee discretion and participate in the discretionary decision process by gathering relevant client information and making recommendations to Discretionary Committee.
- Participate in collaborative tax planning and execution of strategy with Senior Trust Officer / Trust Officer and Tax Officer to minimise income tax owing by estate, beneficiaries or deceased.
- Partner with Clients, Regional Estate and Trust Administrator, and other parties as necessary to obtain documentation, personal information, statutory declarations, distribution instructions, tax information, releases, approvals, to ensure administration is on plan
- Liaise and consult with Senior / Trust Officer (STO/TO – Home Office) during the estate and trust administration with assistance and support of Regional Estate & Trust Administrator, Senior Trust Administrator, Tax Officer and Estate & Trust Advisor.
- During estate and trust administration, you will partner with a broader network of MD financial experts (Senior Trust Officers, Trust Officers, Regional Estate & Trust Administrators, Senior Trust Administrators, Tax Officers and Estate & Trust Advisors) to ensure client needs are addressed in a compassionate yet pro-actively fashion.

Related to **Testamentary Trusts and Powers of Attorney** you will:

- Review trust documentation and related forms, ensuring thoroughness, accuracy, and consistency prior to forwarding to Central Administration (Home Office).
- Proactively manage relationships with clients, conducting periodic review, managing appropriate client records and notes, and ensuring MD Private Trust client service commitments are met or exceeded.
- Review and approve invoices and non-discretionary funding requests from beneficiaries, prepare documentation, and participates in discretionary decisions.
- Communicate regularly with MDPT team members both informally and formally, to ensure the efficient and timely flow of information to all interested parties, conveying technical material in a manner that is tailored to the audience's level of interest and understanding.
- Act as backup to the Estate and Trust Advisor on technical matters, as required.

What MD Expects of You:

- A commitment to **an exceptional client experience** - regularly delivering an exemplary experience built on a foundation of client first, attention to detail, mutual trust, and great integrity.
- **A sense of urgency** - what's urgent for your client is urgent for you. Attending to their needs is your priority.
- You're a **natural confidante** – possessing the interpersonal and communication skills that allow you to mentor others and deal with sensitive and difficult client situations in a gracious and professional manner.
- The ability to **work independently** and as **part of a broader team**, always seeking out new ways to collaborate and contribute.
- You **embrace change** – thriving in a diverse environment of ever-changing priorities where ambiguity, multi-tasking and tight deadlines are the norm.
- **A desire to learn** - to further your knowledge of advanced estate and trust planning concepts and legislation.
- **A commitment to compliance** – an understanding of industry regulations and associated requirements, an appreciation for Scotiabank's risk appetite, and a commitment to ethical day to day activities and decisions.
- **Confidence** – in yourself, in MD's products, and in the advice you provide.

The Must Haves:

- Proven experience in estate and trust administration.

- University degree or college diploma in business, commerce or financial planning or equivalent experience.
- Accreditation: CETA or TEP (STEP Canada); MTI - Personal Trust (CSI Global Education Inc.), or equivalent
- In-depth knowledge of relevant legislation, taxes and government filing requirements regarding estates and trusts, trust systems and reporting.
- Demonstrated experience with Microsoft Office Suite.
- Ability to travel as required within assigned territory.

Why MD?

- We are big proponents of **life-work integration** and provide the flexibility and tools to achieve such.
- We believe an **inclusive and diverse** work environment makes for happy and productive employees.
- We recognize the importance of **well-being** and offer programs and benefits to support and sustain the mental and physical health of our employees and their families.
- We know that **financial security** is important to you and we're here to help – competitive salaries and incentive programs, a defined contribution pension plan and an employee share option purchase program.
- We realize **time away** to recharge is a non-negotiable – we offer a generous paid time off program in which the benefits increase along with your tenure with MD. Our team environment ensures you're able to take time off without worrying about your clients.
- We understand that cost-effective **banking solutions** mean more money in your pocket – through our partnership with Scotia, we offer a variety of preferred banking, credit card, mortgage and home/auto insurance options and discounts.
- We love **discounts**. Through the WorkPerks program, as an employee of MD you'll have access to thousands of discounts with various vendors across Canada.

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