



TRUST OFFICER
Solus Trust Company Limited

Solus Trust Company Limited is a privately owned, non-deposit taking independent trust company with no affiliation to big banks or investment firms. We are dedicated to solely offering personalized fiduciary services in British Columbia. Our independent, unbiased approach reduces the conflicts of interest traditional trust companies have when offering their own services and investment products.

We are seeking a full-time, experienced trust and estate professional to establish relationships with clients to understand, manage and administer their complex plans and wishes.

DUTIES AND RESPONSIBILITIES

Trust File Management

- Establish and manage client/beneficiary/co-trustee relationships.
- Manage trust, estate and other fiduciary services, coordinating the application of any specialized expertise or services that may be required.
- Complete account-opening and closing procedures.
- Ensure all account information on internal systems is current, complete and accurate.
- Monitor client account activity and balances.
- Arrange for transfers of funds to / from third party investment managers.
- Monitor management plan adherence for guardianship accounts.
- Check fee calculations for trusts and estates as needed.

Client Relations

- Provide personalized service to clients/beneficiaries, exemplified by timely and accurate account administration.
- Demonstrate technical expertise, to identify needs and concerns of clients, their advisors and where applicable, the co-trustees.

Administration

- Administer estates, trusts, power of attorney and agency accounts.
- Coordinate all administrative responsibilities prior to and after death of client and their estates.
- Review and collect accounts receivable for all active clients.
- Ensure completion of quarterly file audit.
- Facilitate and maintain internal audit procedures in conjunction with other Trust Department members.
- Contact service providers, government agencies and other related parties when necessary for account administration purposes.
- Participate and support other team members with previous experience and expertise.
- Mentor junior trust administrators to learn and understand trust and estate guardianship.

**Qualifications and Skills:**

- Post-secondary education or equivalent industry experience with trust administration, legal administration and/or accounting.
- Experience in financial or trust services involving knowledge of trust accounting principles and systems.
- Expert estate and trust accounting and administration experience and knowledge of fiduciary responsibilities.
- Thorough knowledge of relevant estate, tax, trust, incapacity, business, family and charity law.
- Working knowledge of foreign jurisdiction connection issues and implications.
- Technical knowledge and fiduciary experience of estate and/or trust experience.
- Experience in financial or trust services involving knowledge of trust accounting principles and systems.
- Exceptional client relations experience dealing with confidential and complex intricacies.
- Enrolment in or aspiring to complete professional designation/diploma (TEP, CETA, or MTI) preferred.
- Occasional travel required, and valid BC Driver's License and access to a vehicle would be preferred.
- Fluency in English required, fluency in Asian languages would be an asset.

WHAT WE OFFER AND WHAT TO EXPECT:

- A dynamic and inclusive workplace.
- Prime downtown office location, with option for hybrid remote/office work arrangement.
- Top tier compensation, benefits, and vacation package.

Solus Trust is committed to the health and safety of our team members as well as the elderly and vulnerable clients we serve. As such, we have implemented a mandatory vaccination policy requiring that all employees must be fully vaccinated against COVID-19. Should there be a need for an exemption based on the BC Human Rights Code protected grounds, then reasonable accommodations will be made upon request. These will be reviewed and discussed on a case-by-case basis.

HOW TO APPLY:

Please submit your cover letter, including salary expectation along with a resume to: jobs@solustrust.com.

An offer of employment is conditional on Solus Trust receiving satisfactory employment checks including criminal, credit, civil, regulatory (as applicable), and reference checks. We thank all applicants for their interest; however, only those candidates selected for an interview will be contacted. No agencies please.

For more information, please visit: www.solustrust.com.