Trust Officer

Job Description

KEY ACCOUNTABILITIES
CUSTOMER

- Facilitate the integration of Trust products by clearly understanding the evolving needs and circumstances of the clients and by working closely with business partners to ensure all Trust needs are identified and fulfilled
- Build and maintain relationships with existing clients, beneficiaries and co-trustees, with responsibility for client profiling to identify/anticipate needs of clients and their families, and manage sales and referrals
- Ensure identified prospective PT clients receive the PT services they require and refer other opportunities to TDBG and Wealth partners
- Relationship management of a group of accounts and clients involving professional practice and the exercise of judgment in discretionary matters and supervision of tax, investment and administrative services provided by internal partners
- Creating a comprehensive advice plan for clients with complex needs and possesses the requisite skills to advise in niche areas where appropriate
- Ensure each client is provided a legendary client experience by including a strong and sustainable client contact routine

SHAREHOLDER

- Implement sales strategies to retain clients, sales opportunities and referrals in order to increase profitability and enable business growth
- Support the growth of the center's book of business by acting as a specialist resource for PWM Partners
- Identify opportunities within the existing book of clients to refer to Wealth, Commercial and other parts of TDBG
- Identify, suggest and actively participate in process improvement opportunities
- Actively manage relationships within and across various business lines/ corporate and/or control functions and ensure alignment with enterprise and/or regulatory requirements
- Keep abreast of emerging issues, trends, and evolving regulatory requirements and assess potential impacts
- Maintain a culture of risk management and control, supported by effective processes in alignment with risk appetite
- Assume responsibility to minimize operational and regulatory risk by complying with Bank and industry Code of Conduct

EMPLOYEE / TEAM

- Participate fully as a member of the team, support a positive work environment that promotes service to the business, quality, innovation and teamwork and ensure timely communication of issues/ points of interest
- Provide thought leadership and/ or industry knowledge for own area of expertise and participate in knowledge transfer within the team and business unit
- Keep current on emerging trends/ developments and grow knowledge of the business, related tools and techniques

- Participate in personal performance management and development activities, including cross training within own team
- Keep others informed and up-to-date about the status / progress of projects and / or all relevant or useful information related to day-to-day activities
- Contribute to team development of skills and capabilities through mentorship of others, by sharing knowledge and experiences and leveraging best practices.
- Lead, motivate and develop relationships with internal and external business partners / stakeholders to develop productive working relationships.
- Contribute to a fair, positive and equitable environment that supports a diverse workforce
- Act as a brand ambassador for your business area/function and the bank, both internally and/or externally

BREADTH & DEPTH

- Professional role requiring in-depth knowledge / expertise in own domain / field of specialty and working knowledge of broader related areas
- Applies business and financial principles to improve delivery of the products and services provided
- Possesses a deep understanding of the business, the competitive landscape, and the economic and legal/regulatory environment affecting the industry and client segment
- Provide client relationship management of an assigned client portfolio; serves as a segment or product expert
- Leads the identification and management of accounts across a product or client segment
- Reports to Private Trust Manager

EXPERIENCE & EDUCATION

- Undergraduate degree
- 5+ years of industry experience
- Working towards completion of Canadian Securities Course
- Working towards completion of TEP – Trust & Estate Practitioner an asset
- Professional Designations such as MBA, CA, LLB, CFA etc. are desirable, however are not required

To Apply:
https://td.wd3.myworkdayjobs.com/en-US/TD_Bank_Careers/job/Trust-Officer_R_1350396