

Title: Estate & Trust Consultant - Vancouver



Requisition ID: 202621

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture.

Please apply directly on our site at: <https://jobs.scotiabank.com/job/Vancouver-Estate-&-Trust-Consultant-Vancouver-BC-V6B4N7/582563917/>

As a **Scotiabank Estate & Trust Consultant**, you are a key member of the Scotiabank team, providing clients with a premium wealth management experience. As part of an innovative team-based approach to wealth management, you will work to deepen and strengthen client relationships by providing clients with customized, needs-driven solutions, leveraging the full suite of "Total Wealth" products and services. You will proactively leverage business development strategies, working in partnership, generating new opportunities to support a holistic approach to exceeding our client expectations and earning the business will be the key to your success in this role.

Is this role right for you? In this role, you will:

- Deliver Scotiabank's estate planning services and other estate and trust solutions to High Net Worth (HNW) Scotia Wealth Management clients, by:
 - Partnering with Scotiabank & Scotia Wealth Management advisors to meet with HNW clients and prospects, creating a positive experience for the client and the advisor, adding value by providing estate and trust solutions by preparing high level estate plans and highlighting appropriate, needs-based estate planning strategies and solutions as well as other Wealth opportunities

- Develop and strengthen relationships and build new relationships with clients, partners, centres of influence, networking and other business development opportunities.
- Play key risk management role by being responsible and accountable for always doing the right thing for clients and ensuring that actions and behaviours drive a positive client experience while operating within the relevant policies and guidelines established for the role
- Contribute to the effective functioning of the team by: Building effective working relationships with various business lines and corporate function contacts, Coaching and mentoring Associate Estate & Trust Consultants, and Facilitating a culture of open and honest communication
- Champion a customer focused culture to deepen client relationships and leverage broader Bank relationships, systems and knowledge.
- Create an environment in which their team pursues effective and efficient operations of their respective areas in accordance with Scotiabank's Values, its Code of Conduct and the Global Sales Principles, which ensuring the adequacy, adherence to and effectiveness of day-to-day business controls to meet obligations with respect to operational, compliance, AML/AFT/sanctions and conduct risk.
- Champion a high performance environment and contributes to an inclusive work environment.

Do you have the skills that will enable you to succeed in this role? We'd love to work with you if you have:

- Proficiency in Mandarin (spoken & written) & experience with Asian clientele (not required but would be an asset)
- Background and experience in estate, trust or financial planning, 3 years wealth planning experience
- In-depth experience dealing with HNW clients and their advisors
- In-depth knowledge and technical proficiency related to wealth and estate planning strategies such as insurance, tax, family and charity law ,and business succession
- University degree in law, an asset

- Lawyer or notary with experience in wills and estate planning, an asset Membership of the Society of Trust and Estate Practitioners (STEP), Trust and Estate Practitioner (TEP) designation, an asset

Location(s): Canada : British Columbia : Vancouver

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please [click here](#). Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview will be contacted.