LEGACY
PRIVATE TRUST

Job Posting

Job Title	**Trust Manager**
Job Status	Permanent, Full Time (40hrs+/wk)
Location	Toronto, ON
Position Overview	We are seeking a skilled and experienced trust and estate professional with strong leadership and people management skills. The Trust Manager is responsible for overseeing the daily operations of the Trust Department, ensuring excellence in client service, operational efficiency, and strategic execution of departmental goals. This individual will supervise trust, estate, POA, guardianship, agency and other fiduciary account administration, lead a high-performing team, and collaborate across business functions to deliver tailored fiduciary services aligned with Legacy's commitment to exceptional client experience. This position offers the option of a hybrid work schedule.
Preferred Qualifications	• Legal experience is preferred, particularly in wills, estate administration, trusts, trust and estate-related administration, tax rules, and planning concepts. • TEP designation is considered an asset.
Requirements	• Bachelor's degree in Business, Law or a related discipline; • Minimum 5 years of business experience, ideally in a trust, financial services, or related environment; • Proven leadership experience with the ability to manage a team and foster professional growth; • Strong understanding of client service and experience standards; • Excellent judgment and decision-making abilities; • Strong communication, interpersonal, and relationship-building skills; • High level of organizational and time-management skills; • Ability to collaborate effectively with internal teams including Sales, Marketing, Client Services, Compliance and Finance; • Ability to work independently and under pressure to meet tight deadlines.
Skills	• Comprehensive knowledge of fiduciary services, including trusts and estates; • Familiarity with financial and investment markets; • Strong strategic thinking, problem-solving, and process improvement skills;

	• Ability to design and implement policies and procedures to ensure operational excellence; • Outstanding written and verbal communication skills; • Comfortable representing the organization externally with clients, partners, and industry professionals.
Job Functions and Responsibilities	**Trust Department Operations** • Lead and manage trust department staff, ensuring efficient workflows and delivery of high-quality client service; • Conduct regular team meetings and performance reviews; • Oversee account administration and assign new accounts appropriately; • Monitor and improve internal processes and external partnerships; • Track and analyze business results, maximizing departmental profitability; • Implement cost-saving strategies and manage department budget; • Ensure timely completion of quarterly internal audits and RCMS (Regulatory Compliance Management System) tasks; • Drive innovation through development and execution of new initiatives and procedures; • Conduct Will Reviews; and • Advise department members on complex trust and estate matters. **Strategic Planning & Development** • Set and manage departmental goals on a quarterly and annual basis; • Plan for growth based on account volume and future business needs; and • Collaborate with senior leadership on department strategy and business plan execution. **Team Development** • Support the professional development of Trust Department members; • Support individual development plans; and • Promote a culture of continuous improvement and learning. **Personal Development** • Pursue relevant continuing education and certifications; and • Attend industry seminars, webinars, and events to stay informed on trends and best practices.

Company Description	At Legacy Private Trust we specialize in professional fiduciary services, including the management and administration of trusts, estates, powers of attorney, agencies, guardianships, foundations and tax & accounting services. Legacy Private Trust offers a dynamic workplace and an employer-paid benefits package. Legacy Private Trust encourages applications from all qualified individuals. Applicants with disabilities may notify us of any accommodations needed to support their participation in the recruitment process. We wish to thank all applicants for their interest and effort in applying. Please be aware that only candidates selected for interviews will be contacted for this position.
How To Apply	Please click on the following link to apply: Legacy Private Trust: Careers Questions can be directed to Krystal Walker at kw@legacyprivatetrust.com