Senior Trust Advisor

What is the opportunity?

As a Senior Trust Advisor with RBC Royal Trust, you will be responsible for achieving profitable business results through the development and retention of a book of high-net-worth (HNW) clients within a specific territory. Results will be achieved through a relationship management approach with clients and partners. You will also work in partnership with the Regional Manager to implement strategies, processes, and sales management disciplines in order to achieve sustainable earnings and revenue growth. You are a team player, which is an important skill in this role as success is dependent on working in cooperation with others. For more information, please visit our website.

What will you do?

- Create an exceptional client experience by providing superior service and comprehensive fiduciary solutions that meet client needs/goals
- Develop proactive client contact strategies for each client to ensure broadening of the client relationship to the next generation and with RBC Wealth Management and other RBC platforms, through ongoing client discovery
- Ensure client strategic objectives are known, reviewed and a documented client action plan is set up customized to the client's unique situation. Action Plans are communicated on a regular basis with clients and partners to ensure seamless integrated RBC planning.
- Identify any referral opportunities to appropriate professionals across the RBC network and other centers of influence (COIs) where appropriate
- Demonstrate a commitment to taking ownership and accountability for efficient client problem resolution
- Develop and maintain COIs and internal RBC partnerships to drive referrals and new client acquisition
- Develop and execute against a well thought out and robust business plan and approach within market to actively seeking new business opportunities
- Assist Regional Manager in establishing goals for employees within team that are clearly defined, and align them with the overall strategic priorities of the business

What do you need to succeed?

Must Have

- A minimum of 5 years providing Trust and Estate related advice to clients
- Hold TEP designation or working toward it
- University degree
- Designated or accredited as a Senior Trust Officer

Nice to Have

- CSC
- 3-5 years' experience with value-based selling

What's in it for you?

We thrive on the challenge to be our best, progressive thinking to keep growing, and working together to deliver trusted advice to help our clients thrive and communities prosper. We care about each other, reaching our potential, making a difference to our communities, and achieving success that is mutual.

- A comprehensive Total Rewards Program including bonuses and flexible benefits, competitive compensation, commissions, and stock where applicable
- Leaders who support your development through coaching and managing opportunities
- Ability to make a difference and lasting impact
- A world-class training program in financial services
- Work in a dynamic, collaborative, progressive, and high-performing team

Please apply on line at:

https://jobs.rbc.com Job #: 201859

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Stay in-the-know about great career opportunities at RBC. Sign up and get customized info on our latest jobs, career tips and Recruitment events that matter to you.

Expand your limits and create a new future together at RBC. Find out how we use our passion and drive to enhance the well-being of our clients and communities at rbc.com/careers.

JOB SUMMARY
City: Toronto
Address: 155 Wellington St. West
Work Hours/Week: 37.5
Work Environment: Office
Employment Type: Permanent
Career Level: Experienced Hire/Professional
Pay Type: Salary + Commission
Required Travel (%): 26-50
Exempt/Non-Exempt: N/A
People Manager: No
Application Deadline: 11/26/2019
Platform: Wealth Management
Req ID: 201859