



# Wealth Management

## Regional Trust Advisor

### What is the opportunity?

As the Regional Estate and Trust Advisor, Royal Trust, you will primarily be responsible for promoting and closing Estate and Trust business. You are a seasoned Sales Professional, and you will be based out of Saskatoon, Saskatchewan and responsible for supporting the Saskatoon & Northern Saskatchewan Markets within the region. Your goal will be growing the RBC Estate and Trust book of business in these regions. For more information, please visit: <https://royaltrust.rbcwealthmanagement.com/en>

**Please note: this role is based in Saskatoon.**

### What will you do?

- As a Sales Professional, you will promote Estate and Trust (E&T) Services to RBC P&CB segment as well as Canadian Wealth Management
- You will also partner with Financial Planners and IRP (Investment Retirement Planners), as well as Dominion Securities Investment Advisors and PH & N Investment Counsellors to build awareness of Estate and Trust products and services.
- You will identify client needs and provide solutions through the sale of E&T Services
- By ensuring client strategic objectives are met, you will review and document a client action plan for each unique situation
- You will also be responsible for executing nationally consistent activities to promote and raise awareness of E&T service products
- You will maintain an ongoing pipeline of new business opportunities
- By following due diligence, you will ensure all RBC policies are adhered to
- Finally, using your ability to partner successfully with internal and external clients you will endeavor to meet and exceed key objectives
- Act as the Estate & Trust expert for high net worth segment in the region

### What do you need to succeed?

#### Must Have

- Post secondary diploma or degree in a related field
- A minimum of 5 years related experience in the Financial Services Industry
- A minimum of 3-5 years proven sales experience, including funnel management, tools and tracking
- Strong knowledge of estate and related administration
- Ability to travel within Saskatchewan Region. Must have own transportation.
- Experience with servicing high net worth client segment

## Nice to Have

- CFP ( Certified Financial Planner ) is an asset
- TEP, (Trust and Estates Practitioner ) or PFP (Personal Financial Planner ) is an asset
- Previous experience in the Estate and Trust field

## 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
- Flexible work/life balance options
- Opportunities to do challenging work

Apply at: <https://jobs.rbc.com>

Requisition #: 219286

## About RBC

Royal Bank of Canada is Canada's largest bank, and one of the largest banks in the world, based on market capitalization. We are one of North America's leading diversified financial services companies, and provide personal and commercial banking, wealth management, insurance, investor services and capital markets products and services on a global basis. We have over 80,000 full- and part-time employees who serve more than 16 million personal, business, public sector and institutional clients through offices in Canada, the U.S. and 37 other countries. For more information, please visit [rbc.com](http://rbc.com).

## Join our Talent Community

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](http://rbc.com/careers).

## Inclusion and Equal Opportunity Employment

RBC is an equal opportunity employer committed to diversity and inclusion. We are pleased to consider all qualified applicants for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, protected veterans status, Aboriginal/Native American status or any other legally-protected factors. Disability-related accommodations during the application process are available upon request.

## JOB SUMMARY

**City:** Saskatoon

**Address:** Saskatoon

**Work Hours/Week:** 37.5

**Work Environment:** Office

**Employment Type:** Permanent

**Career Level:** Experienced Hire/Professional  
**Pay Type:** Salary + Variable Bonus  
**Required Travel (%):** 51-75  
**Exempt/Non-Exempt:** N/A  
**People Manager:** No  
**Application Deadline:** 03/15/2020  
**Req ID:** 219286