At MD Financial Management, we have one mandate: to help Canadian physicians achieve financial well-being by focusing on their distinctive needs and operating in their best interests. Our commitment to work/life integration, employee well-being and ongoing learning are key factors that contribute to our overall success.

For the sixth consecutive year, MD Financial Management has been recognized as one of the Achievers 50 Most Engaged Workplaces™ in North America. The annual award, given by Achievers—an industry-leading provider of employee recognition and engagement solutions—commends top employers that display leadership and innovation in engaging their workforces.

What You Will Do:

The Regional Trust Officer's primary responsibility is to lead the client relationship and administration activities for estate and trust settlement.

Estate Administration:

Proactively manages relationships with family members and others during settlement of deceased clients' estates

Arranges to meet with beneficiaries/co-executors/co-liquidators for initial client meeting to obtain key documentation required to commence with estate settlement

Completes an initial assessment of requirements for safeguarding and appraisals for real estate, household items and personal effects

Liaises and consults with Senior Trust Officer (STO – Home Office)) during the estate and trust administration with assistance and support of Regional Trust Administrator, Senior Trust Administrator, Tax Officer and Estate & Trust Advisor

Prepares initial estate documentation and related forms ensuring thoroughness, accuracy and consistency to be forwarded to Central Administration (Home Office) to commence with administration activities

Follows relevant provincial legislation and MD policy during estate settlement process

Proactively communicates frequently with co-executor and beneficiaries with status updates (letter, phone or e-mail)

Identifies matters requiring the exercise of executor/trustee discretion, and participates in the discretionary decision process by gathering relevant client information, making recommendations to Discretionary Committee, as required

Participates in collaborative tax planning and execution of strategy with Senior Trust Officer and Tax Officer to minimize income tax owing by estate, beneficiaries or deceased

Follows up as necessary to obtain documentation, personal information, statutory declarations, distribution instructions, tax information, releases, approvals, to ensure administration is on plan

Testamentary Trusts and Powers of Attorney:

Prepares trust documentation and related forms ensuring thoroughness, accuracy and consistency to be forwarded to Central Administration (Home Office)

Conducts periodic reviews with clients

Reviews and approves invoices and funding requests from beneficiaries

Prepares documentation and participates in discretionary decisions

Proactively manage relationships with clients

General:

Network and promote MDPT services to MDPS and beneficiaries to identify new business opportunities for MDPT

Frequent travel within territory

Participate in in-house seminars

Takes efficient and timely actions in an effort to meet/exceed MDPT's client service commitments

Communicates regularly with MDPT Team Members both informally and formally, to ensure efficient and timely flow of information to all interested parties; conveys technical material in a manner that is understandable, verbally and in writing

Maintain appropriate client records on information systems

Act as backup to the Estate and Trust Advisor on technical matters, as required

What You Need:

University Degree or Equivalent

Accreditation (TEP or CETA) from STEP Canada or (MTI-Personal Trust) CSI Global Education Inc., or equivalent

Knowledge of relevant legislation, taxes and government filing requirements regarding estates and trusts

Strong knowledge of PC applications, including Excel and MS Word

Five to ten years' experience in estate and trust administration

Strong client relationship management experience

Detailed knowledge of trust systems and reporting

What You Bring:

Stewardship of the client experience

Strong organizational skills and a high level of attention to detail

Outstanding interpersonal skills – able to deal with sensitive and difficult client situations in a gracious and professional manner

Excellent communication skills

Flexible and adaptable

Self-motivated, resourceful and takes initiative

Ability to work cohesively with peers and service partners

Ability to guide and mentor others in estate and trust settlement process

What Success Looks Like:

You are passionate about the MD value proposition and actively look to serve clients.

You are constantly learning and honing your skills.

You are technology savvy and endeavor to find new and exciting ways to use technology in the servicing of your client.

You feel rewarded and recognized in a way that inspires you to do your best work.

To apply, please follow the link:
https://vizi.vizirecruiter.com/MD-Financial-Management-1921/51788/index.html