



TD Private Wealth Management takes a sophisticated and holistic goals discovery approach to wealth planning and protection to provide highly personalized advice, solutions and service to clients. **Private Trust** builds dynamic and long-lasting relationships with high net worth clients. Our highly integrated core team and other wealth partners work seamlessly together as ONE TD to help clients manage, preserve or transfer wealth according to the client's wishes for future generations.

Job Description

CUSTOMER: Facilitate the integration of Trust products by clearly understanding the evolving needs and circumstances of the clients and by working closely with business partners to ensure all Trust needs are identified and fulfilled Identify further client needs and sales opportunities from within the existing client base Refer any identified prospective PT clients to the Estate and Trust Advisor and other referral opportunities to TDBG and Wealth partners (SM note: We should align this to Compensation Guide, which allows Trust Officers to reactively serve COIs.) Relationship management of the largest and most complex and technical client accounts and clients involving professional practice and the exercise of judgment in discretionary matters and supervision of tax, investment and administrative services provided by internal partners Create a comprehensive advice plan for clients with complex needs and possesses the requisite skills to advise in niche areas where appropriate Establish and maintain relationships with existing clients and with those referred as business development opportunities by the Estate and Trust Advisor

SHAREHOLDER: Implement sales strategies to retain clients, sales opportunities and referrals in order to increase profitability and enable business growth Partner with Estate Trust Advisor to execute on a robust sales plan that aligns to market and business strategies Support the growth of the centers book of business by acting as a specialist resource for PWM Partners Identify opportunities within the existing book of clients to refer to Wealth, Commercial and other parts of TDBG Identify, suggest and actively participate in process improvement opportunities Actively manage relationships within and across various business lines/ corporate and/or control functions and ensure alignment with enterprise and/or regulatory requirements

Keep abreast of emerging issues, trends, and evolving regulatory requirements and assess potential impacts Maintain a culture of risk management and control, supported by effective processes in alignment with risk appetite Assume responsibility to minimize operational and regulatory risk by complying with Bank and industry Code of Conduct

EMPLOYEE / TEAM: Participate fully as a member of the team, support a positive work environment that promotes service to the business, quality, innovation and teamwork and ensure timely communication of issues/ points of interest Provide thought leadership and/ or industry knowledge for own area of expertise and participate in knowledge transfer within the team and business unit Keep current on emerging trends/ developments and grow knowledge of the business, related tools and techniques Participate in personal performance management and development activities, including cross training within own team Keep others informed and up-to-date about the status / progress of projects and / or all relevant or useful information related to day-to-day activities Contribute to team development of skills and capabilities through mentorship of others, by sharing knowledge and experiences and leveraging best practices. Lead, motivate and develop relationships with internal and external business partners / stakeholders to develop productive working relationships. Contribute to a fair, positive and equitable environment that supports a diverse workforce Act as a brand ambassador for your business area/function and the bank, both internally and/or externally

Job Requirements

BREADTH & DEPTH: Highly seasoned professional role requiring substantial knowledge / expertise in a complex field and knowledge of broader related areas Integrate knowledge of the enterprise sub-functions or business lines overarching strategy Anticipates, identifies and interprets market trends, and applies this knowledge to serve the needs of the clients Manages existing strategic accounts/opportunities that represent the business segments largest/most important accounts and/or assist with business development focuses Solves or may lead others to solve complex problems; leads efforts to develop new product and service solutions or structure complex deals Guides and influences clients and stakeholders; converts information to compelling business context and advice at increasingly senior levels Works autonomously as the 'lead' and coaches and guides members within area of expertise Reports to the Private Trust Manager

EXPERIENCE AND / OR EDUCATION: Undergraduate Degree
Canadian Securities Course CSI Tax Considerations for Estate & Tax
Completion of ICB courses TEP Trust & Estate Practitioner
Professional Designations such as MBA, CA, LLB, CFA etc. are
desirable, however are not required

To Apply: <https://jobs.td.com/en-CA/jobs/10984508/executive-trust-officer-kelowna-ca/>