Director, Estate Planning – BMO Nesbitt Burns - Vancouver, BC – R200013113

MANDATE:

Provides specialized wealth planning for High Net Worth / Ultra High Net Worth (HNW/UHNW) clients to help meet their long-term financial objectives. Leverages specialized knowledge and experience to partner collaboratively with other planning professionals and Relationship Managers (Private Bankers, Investment Counsellors, Investment Advisors) to provide clients with comprehensive wealth planning advice and solutions encompassing financial, tax, succession, philanthropic, will, estate and trust planning in connection with their overall wealth planning needs. Supports the growth and retention of HNW/UHNW client assets through specialized planning solutions that help to broaden the dialogue and enhance the client relationship in order to consolidate client assets and increase revenues. Contributes to enhancing the client and BMO Advisor experience thus driving increased profitability, improved share of wallet and Net Promoter Scores.

- Provides customized advice and specialized planning services to HNW/UHNW client segments.
- Facilitates/participates in goals-based discovery process directly with clients and ensures standards relative to data capture and plan creation are met thereafter to maintain effective knowledge management within business/group.
- Demonstrates a consultative and collaborative value-added approach in client conversations, acting as a member of a client strategy team to facilitate the desired client experience.
- Applies well-developed consultative sales and wealth planning principles, practices and techniques in client interactions.
- Acts as a subject matter expert in area(s) of specialized planning, including regulations and policies, to properly assess and provide insights and solutions to clients.
- Leverages financial analysis in the development of detailed and complex financial plans.
- Consults with clients and their external advisors on complex issues, as required.
- Provides commentary and awareness on emerging trends and new legislation through articles, case laws, and advanced planning solutions.
- Develops content in the area(s) of specialized planning for use as training material, internal resource material and client-facing material.
- Leads/participates in the development/presentation of educational programs in the area(s) of specialized planning within BMO and to clients.
- Develops/maintains internal and external networks and referral sources to ensure ongoing growth of the business.
- May network with industry contacts to gain competitive insights and best practices.

- Protects the Bank's assets by adhering to all banking and investment regulations, Bank policies and procedures, legal and ethical requirements and regulations, process requirements, and established risk guidelines.
- Operates at a group/enterprise-wide level and serves as a specialist resource to senior leaders and stakeholders.
- Applies expertise and thinks creatively to address unique or ambiguous situations and to find solutions to problems that can be complex and non-routine.
- Implements changes in response to shifting trends.
- Broader work or accountabilities may be assigned as needed.

QUALIFICATIONS:

- Typically between 5 - 9 years of relevant experience and a University degree in relevant field of study.
- Post-graduate degree is desirable.
- Relevant professional designation is considered an asset.
- Experience dealing with HNW/UHNW clients.
- Proven track record in developing and growing a profitable financial or related client services business.
- Extensive knowledge and technical proficiency related to wealth planning strategies, issues and trends.
- Broad knowledge of financial institutions, services and products.
- Broad knowledge of investment management principles, economics and financial markets.
- Seasoned professional with a combination of education, experience and industry knowledge.
- Verbal & written communication skills - In-depth / Expert.
- Analytical and problem-solving skills - In-depth / Expert.
- Influence skills - In-depth / Expert.
- Collaboration & team skills; with a focus on cross-group collaboration - In-depth / Expert.
- Able to manage ambiguity.
- Data driven decision making - In-depth / Expert.

To Apply to this position, please click on link below and apply directly through our careers site:

https://bmo.wd3.myworkdayjobs.com/External/job/Vancouver-BC-CAN/Estate-Planning-Consultant_R200013113-1

We're here to help

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life. It calls on us to create lasting, positive change for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset.

To find out more visit us at https://bmocareers.com.

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.