Wealth Management
Royal Trust

Senior Trust Officer

What is the opportunity?

As Senior Trust Officer, RBC Royal Trust (RT), you will create an exceptional client experience by providing superior service and a complete range of estate, trust and power of attorney solutions that meet clients' needs. You will achieve business results in partnership with the team by identifying, growing and retaining a long-term profitable High Net Worth (HNW) portfolio of clients. You will also act as the local resource for the Ultra High Net Worth (UHNW) client segment in order to maximize opportunities for RT. By leveraging cross-selling opportunities, you will manage and develop strong relationships with existing and prospective clients and centres of influence.

By joining Royal Trust, you will have direct impact on improving the lives of clients by helping settle their estates and by protecting their legacies. We are a team committed to helping clients achieve peace of mind now and for the future. For more information, please visit: https://royaltrust.rbcwealthmanagement.com/en/

What will you do?

- Create an exceptional client experience by providing superior service and comprehensive fiduciary solutions that meet client needs/goals
- Responsible for the timely and efficient settlement of estates and to provide a superior client experience
- Delivers quality advice/service to clients by keeping current on product, industry, investment, tax, and
- 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 RBC Group of Companies through ongoing client discovery
- Ensure client strategic objectives are known and reviewed, and a documented client action plan is set up customized to the client's unique situation
- Identify any referral opportunities to appropriate Professionals across the RBC network
- Ensure the process for obtaining new business is efficient and seamless to the client and client's professional advisor
- Demonstrate a commitment to taking ownership and accountability for efficient client problem resolution
- Responsible for overall client relationship management and is the representative of the client portfolio
- Assist in ensuring employees within team are able to achieve their potential through effective coaching, mentoring, communication and training and development activities to meet client needs. Be part of a mentorship program to help employees discover and develop their career paths

What do you need to succeed?

Must have

- A minimum of 3 years in a similar role, ideally with an emphasis on Estates
- Canadian Securities Course
- University Degree or equivalent
- TEP (Trust & Estates Professional) Designation or currently enrolled
- Extensive knowledge and ability to communicate with clients about general investment, estate, financial, trust and taxation issues, including economic conditions
- Ability to travel within area

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
- Work in a dynamic, collaborative, progressive, and high-performing team
- Opportunities to do challenging work
- Opportunities to take on progressively greater accountabilities

Email Resume Directly with Subject Line 'Sr. Trust Officer, Calgary' to: donna.gatti@rbc.com