Will & Estate Consultant

What is the opportunity?

As an integral member of Wealth Management Services, your role as a Will & Estate Consultant is to work with Investment Advisors to provide consulting services to their clients, which can then be implemented in coordination with their own tax and legal professionals. This team of accredited professionals enables RBC advisors to deliver a level of integrated wealth management that previously was only available to the most affluent families.

The role will require travel within British Columbia and the position will cover Vancouver, with general location of Lower Mainland and Fraser Valley

What will you do?

- Carry out client interview sessions and create comprehensive summary letters for clients recapping advice discussed in the session
- Participate with advisors in client / prospect seminars and develop and maintain relationships with other estate planning professionals both internal and external to RBC Financial Group.
- Stay current relative to pertinent legislation, policy and risk management issues.
- Proactively identify new business and referral opportunities for RBC Financial Group where appropriate.
- Foster a cohesive working environment across RBC Financial Group to facilitate the seamless delivery of service to clients they encounter.
- Maintain and report an accurate and complete record of activities and results.
- Work with advisors in identifying appropriate opportunities
- Follow through and co-ordinate any actions that come out of the interview process (i.e. various internal and external consultants.)
- Stay current on the business unit's strategy and client offerings

What do you need to succeed?

Must have:

- Canadian Law Degree and called to the bar in at least one Canadian province or territory.
- A minimum of 5 years' experience, and advanced knowledge of Canadian legislation including planning of wills, estate & trust administration; and related tax rules and planning opportunities.
- Good knowledge of various insurance products as estate planning tools.
- Advanced knowledge of common law related to wills, estates and trusts
- Excellent written, verbal and electronic communication skills.
- Valid driver's license

Nice to have:

- Estate and Trust experience
- Knowledge of Insurance Planning and Solutions
- STEP membership

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
- A world-class training program in financial services
- Work in a dynamic, collaborative, progressive, and high-performing team
- Ability to make a difference and lasting impact

How to Apply:

Send your resume to: Rosalyn.arriola@rbc.com
OR Apply online: Will & Estate Consultant