

As a Senior Trust Officer working in a Scotia Wealth Management office, you are a trusted and experienced relationship manager responsible for supporting the company's strategy and revenue goals by profitably delivering a best in class client experience and presenting the full suite of Scotiabank's high quality solutions to high net worth clients of Scotia Wealth Management, in accordance with your clients' needs and expectations and in compliance with policies and procedures. You are also directly involved with the identification and pursuit of new business opportunities, both inside and outside Scotia Wealth Management.

You are client-centric and entrepreneurial, with a strong sense of proactivity and effective at building and maintaining deep relationships with clients as well as internal and external partners. You are a proven, highly skilled professional with expertise in Estate & Trust administration and wealth management of varying complexity, and within the scope of your role you may be required to act as a director/officer of privately held companies.

Through an intimate understanding of clients' goals, needs and circumstances, you are responsible for engaging Scotiabank and Scotia Wealth Management's team of experts as needed, to deliver on total wealth strategies.

Key Job Accountabilities

1. Relationship Management & Client Service

- Fulfill the role of lead relationship manager, acting as the central point of contact for all client needs.
- Provide a best in class, proactive and personalized client experience to high net worth clients and beneficiaries, exemplified by timely and accurate account administration coupled with demonstrated technical expertise, personal integrity and an ability to respond to stated and unstated client needs and concerns.
- Build and maintain effective internal and external partnerships, with a view to providing seamless, impactful solutions across a variety of financial services disciplines.
- Responsible for revenue collection and contributing to the branch's profitability by accurately forecasting and overseeing the timely collection of fees, including making recommendations regarding situations that may warrant a non-standard fee agreement.

2. Business Development

- Work closely with the Estate and Trust Consultants, Scotia Wealth Management partners and their clients to assist with the closing and ongoing servicing of new wealth transition solutions.

3. Risk Management

- Limit corporate risk exposure by ensuring that account administration is carried out proactively and in compliance with defined policies/procedures and audit standards, including the timely escalation of issues to the appropriate internal oversight groups as required.
- Maintain expert knowledge of legislative, administrative and economic issues that impact the management of your accounts and demonstrate an ability to communicate on a broad range of legal and financial issues with clients and their advisors, with particular proficiency in estates, trusts, wills, and investment and taxation matters.

Skills Experience and Functional Competencies

1. Entrepreneurial and capable of consistently delivering a proactive best in class client experience.
2. Effective at building and maintaining deep relationships and partnerships.
3. Proven ability to manage competing priorities without losing focus on key accountabilities
4. Strong interpersonal, verbal communication and negotiation skills and professionalism.
5. Deep understanding of the wealth management landscape and a demonstrated ability to work in an environment that demands tact, objectivity and sensitivity.
6. Strong change management skills and ability to adopt technology and reporting platform changes to support operational improvements, sales management process improvements, etc..
7. Proven ability to execute against financial targets and profitability measures.

Education and Other Requirements

1. Professional and/or industry accreditation, in addition to a university degree.
2. Minimum of 5-7 years of directly-related experience.
3. Proven success in high net worth client relationship management.
4. Membership or commitment to participate in CSI and/or STEP.

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