

# Trust

The Trust Officer is accountable to the Market Leader as well as the Regional Director of Trust, BMO Trust Company, with the primary measurement of success being to meet or exceed an annual assignment of specific revenue and referral targets. Secondary measures of success will include contribution to development of Estate and Trust business in BMO Private Wealth and as a key member of the overall market center professional team. This role is responsible for account administration for Estate and Trust Services line of business (LOB) in the market. A paralegal or lawyer with estate and trust experience could be an excellent candidate for this position.

## **Key Accountabilities:**

### Relationship Management:

- Accountable for ensuring effective administration of a portfolio of Personal Trust Accounts – Estates, Trusts, POA, Investment Administration and EnCircle within the regional market. The position is recognized as a specialist in Trust administration.
- Primary relationship manager for a portfolio of accounts including large and complex situations. Develop strong internal and external networks and referral sources. Develop and implement strategies to increase the scope of services to existing and potential clients.
- Accountable for meeting or exceeding the regional client experience standards for trust and estate administration, investment administration and EnCircle businesses.

### Business Strategy and Execution:

- Implement a business plan for Estate and Trust Services within the regional market, with clearly defined annual objectives for revenue growth for each business line - one time estate and trust, ongoing trust, Investment Administration and EnCircle and referrals to other lines of business in BMO Private Wealth and partners in BMO Financial Group.
- Provide professional support to team members and partner with an integrated team of wealth management professionals (investment, banking, trust, sales) to meet or exceed business objectives.
- Support the Market Leader in the execution of the Market Wealth Services business strategy within the Market's Private Wealth centers and P&BB branches.
- Partner with the Market Leader in the development of the market client, employee and community education strategies.

Leadership:

- Provide coaching on trust and wealth services products and services to trust administrators, Private Wealth Consultants, Financial Planners, Investment Advisors and other distribution channels in BMOFG.
- Manage service activities related to Personal Trust/Wealth Services job administration in the local market center.
- Promote and support a work environment that inspires innovation, creativity, collaboration and diversity.
- Support the Market Leader as change agent for needed changes in the Personal Trust/Wealth Services Group and BMO Private Wealth.

Risk Management:

- Comply with all compliance requirements.
- Ensure adherence to Policies and Procedures for account administration within the market center.

Cross Functional Relationships:

- Liaise with Compliance, P&BB Operations, Legal and other lines of business to resolve system, administrative, risk management and legal issues pertaining to estate and trust administration.
- Work with outside lawyers and accountants retained by estates and trust under administration.

Knowledge:

- Law degree or other university degree supported by MTI, STEP, CETA Accreditation or equivalent.
- Proven track record in administering and growing a profitable book of estate and trust accounts and/or providing estate and trust advice to clients.
- Recognized as a specialist in estates and trusts in a law firm, a Private Bank or in the industry.
- Minimum 3-5 years of related experience.

Skills:

- Capacity to establish and manage relationships with clients who may be bereaved or otherwise difficult to deal with.
- Strong networking and business development skills.
- Good leadership abilities.
- Excellent communication skills; both written and verbal.
- Strong work ethic, work well under pressure.
- Flexible and empathetic, able to work effectively in a variety of situations.
- Ability to resolve a magnitude of diverse, complex and ambiguous issues/situations in a practical manner.

At BMO, we have been helping our customers and communities for over 200 years. Working with us means being part of a team of talented and passionate individuals with a shared focus on working together to deliver great customer experiences. We stand behind your success with the support you need to turn your potential into performance. At BMO, you have more than a job. We help you turn your potential into performance.

BMO Financial Group is committed to an inclusive, equitable and accessible workplace. By embracing diversity, we gain strength through our people and our perspectives. We welcome and encourage applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

To find out more visit our website at [www.bmo.com/careers](http://www.bmo.com/careers).