

Concentra Bank is a purpose-based organization, striving to create the future of banking. We are embarking on a bold plan to evolve and grow into a diversified, top tier performing company delivering greater value to employees, customers, and owners.

As an innovative and future-focused company, we form partnerships to deliver industry-best financial solutions to our customers. We offer a wide range of financial solutions including specialized banking, consumer finance, treasury, wealth and trust services and more. We strive to be among the most trusted organizations in Canada by solving problems for our customers and offering a positive, seamless experience.

Concentra employees enjoy a competitive total rewards package and flexible work environment. We are looking for an ambitious financial professional to join our team in one of our corporate locations (Regina, Saskatoon, Surrey, Toronto) or in a home office environment.

Our Trust business is a subsidiary of Concentra Bank, and is itself the 7th largest federally regulated trust company in the country, with assets under administration of over \$30 billion.

Senior Vice President of Trust

Reporting to the President and Chief Executive Officer and as a member of the executive leadership team, the SVP of Trust works collaboratively with the executive team to provide strategic direction, oversight and stewardship for the Company. In addition to this primary accountability for corporate leadership, the Head of Trust is the senior executive responsible for overall executive management and strategic execution across all business lines within Concentra Trust, including Registered Plans and Estates and Trusts Planning. The Head of Trust plays a key role in the development for the personal and corporate Trust business including strategy development, business development and growth, management of profitability, and market relevance to target clients.

KEY RESPONSIBILITIES AND OUTCOMES

Establish and manage Concentra Trust's market relevance and revenue generation by:

- Developing growth strategies including the business focus, ensuring annual business targets are achieved and the growth in profitability of the business
- Creating a culture whereby market relevance of offerings are maintained through continual focus on the market, changing trends, and evolving client needs
- Leading the promotion of offerings through education and outreach related to trust and wealth management concepts and strategies through workshops, conferences, and one-on-one presentations
- Building and fostering valuable long-term strategic relationships with clients, provincial/federal regulators and industry professionals
- Leading the path for enhanced client focused technology to further enable and better position the business for the future

Provide leadership and strategic management of Concentra Trust by:

- Providing market leadership through engagement, profile, and market presence with the intent of enhancing market relevance, risk management, client/ member service and profitable growth
- Initiating and assessing new business development opportunities, partnerships, and new ventures with a focus on increasing the market relevance and profitability of Concentra Trust

- Providing leadership, coaching, and mentoring to support the development and growth of team members within the Concentra culture
- Demonstrating change leadership throughout the trust company, communicating the organizational strategic direction and impacts
- Enhancing the customer focus of the trust company through the building and reinforcement of product ownership and accountability, enhanced metrics, and greater customer engagement

Enhance corporate profitability by:

- Developing and implementing strategies to grow and enhance the business in a profitable manner
- Leading the development and oversight of corporate income and expense budgets and ensuring trust targets are met
- Building a business development focus and capability for the trust company
- Focusing on operational efficiency with the use of technology enhancements
- Oversight of department income and expense budgets and ensuring targets are met or exceeded
- Initiating, exploring and pursuing profitable secondary market opportunities

EDUCATION, EXPERIENCE AND CAPABILITIES

The ideal SVP of Trust will have:

- A Master of Business Administration graduate degree, or a university degree in Commerce, Business Administration or Law supplemented with a professional designation that may include Chartered Professional Accountant (CPA), Chartered Financial Analyst (CFA), Trust and Estates Practitioner (TEP), or Certified Investment Management Analyst (CIMA)
- At least 10 years of progressive experience in the financial services industry, including senior level Trust leadership in strategy, sales and relationship management, and risk mitigation
- Deep expertise and knowledge of trust and wholesale finance instruments used by banks in order to diversify and grow services
- Comprehensive knowledge and understanding of the common law, provincial legislation and federal taxation as it applies to trust administration and registered plans
- Strong understanding of risk management in financial services and fiduciary risk in highly regulated environments
- Sophisticated knowledge of sales, marketing and business development skills
- Superior communication skills with the ability to develop and deliver complex information at a level required for the Board, the Executive Leadership Team, and external partners and customers
- The skill to be an agile leader that can pivot and shift with changing needs. You value Agile Ways of Working and the advantages of cross functional teams getting things done
- The ability to engage your teams in the corporate strategy and enable them to make connections to how their work fits into the bigger picture
- A customer focus mindset in leading the team. You inspire your teams to understand the value of our customers and our relationships with them

Applications for this opportunity accepted until end of day **Thursday, July 29, 2021.**

To apply, please visit our Career page at www.concentra.ca

We thank all applicants for their interest, however, only those selected for an interview will be contacted.

At Concentra, our goal is to achieve a workforce as diverse as the people we partner with. We encourage all members of the designated groups; aboriginal people, persons with disabilities, women, visible minorities and others to join our team. Concentra strives to provide a safe and respectful work environment free of discrimination and harassment and is committed to an inclusive, barrier-free recruitment and selection processes.