

Manager, Estate Planning – Job Description



	Full-time
Reports to:	President / CEO
Posting Date:	January 6, 2020
Location:	Downtown, Vancouver
Job Title:	Manager, Estate Planning

About Solus Trust Company Limited (“Solus Trust”)

Solus Trust is a privately owned, non-deposit taking, independent trust company offering fiduciary services in British Columbia. Founded in 2005, Solus Trust has grown to become one of BC’s largest trust companies. Independence, decades of in-depth technical experience, local presence and personalized services make Solus Trust unique among corporate trustees in the province. At Solus Trust, we specialize in personal fiduciary services which include the management and administration of trusts, estates, power of attorneys and agencies.

Position Overview:

Solus Trust is looking for a trust and estates professional to join us as our Manager, Estate Planning whose primary responsibility will be to provide prospective clients of Solus Trust with information on the full range of personal fiduciary services offered by the company. The role also involves liaising with external referral sources such as law firms, investment-advisory firms, accounting firms, charitable organizations and seniors’ organizations.

Job Functions and Responsibilities:

- Review and assess with prospective clients their individual and family estate planning needs, including financial and family issues
- Advise prospective clients on appropriate estate planning issues and techniques and submit planning options for consideration
- Implement estate plans including detailed instructions to client’s legal counsel for preparation of new Will, Trust Deed and Power of Attorney. Review draft legal documents prior to execution by client to ensure client needs are met
- Network and promote Solus Trust services to external professional advisors and prospective clients to develop immediate estate, trust and Power of Attorney business against specific asset collection targets with associated fee income to Solus Trust
- Increase the Solus Trust Wills Bank and maintain the business prospect database
- Conduct regular review of client’s Will and estate plan to ensure plan is current with client circumstances/needs as well as relevant legislation and tax regulations

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- Work in conjunction with external professional advisors to assist in developing client understanding and education of estate planning issues; help differentiate Solus Trust professional executor/trustee/POA solutions from others emphasizing our independence and personalized service
- Participate in seminars and prospective client group meetings explaining the value of estate planning and Solus Trust estate/trust/POA services
- Liaise with external professional advisors to maintain a current roster of Solus Trust recommended estate and trust lawyers, accountants, investment professionals, private bankers, financial planners and insurance agents
- Always act in the best interest of the clients and provide the appropriate level of service and guidance to prospective clients and their families on all aspects of estate planning

Qualifications and Requirements:

- Law degree, accounting designation or accreditation from the Institute of Canadian Bankers (STI or MTI), a member of the Society of Trust and Estate Professionals (STEP) or Certified Financial Planner (CFP).
- 10 years' experience in estate planning and /or estate and trust management
- Strong presentation, computer and database management skills

Personal Characteristics and Experience:

- Stewardship of the client experience
- Solid communication and interpersonal skills including presentation/public speaking skills
- Highly professional demeanor demonstrating integrity and trust
- Ability to work effectively and collaboratively within a team
- Proven networking, business development and sales skills
- Well organized, goal driven and action oriented

Solus Trust offers a dynamic workplace, prime downtown office location and a generous compensation and benefits package. We are looking for a self starter, who wants to work in and/or learn the trust management business, with a desire to participate as an active member of the company and with its clients. For more information about what we do, please have a look at our website. Full job descriptions will also be sent out to suitable candidates. Interested applicants should provide a letter of interest, including salary expectation along with a resume to: jobs@solustrust.com. An offer of employment is conditional on Solus Trust receiving satisfactory employment checks including criminal, credit, civil, regulatory (as applicable) and reference checks. We thank you for your interest in Solus Trust. Please note that only successful applicants will be contacted. No agencies please.