

Trust Officer – Job Description



	Full-time
Reports to:	VP Operations
Posting Date:	January 6, 2020
Location:	Downtown, Vancouver
Job Title:	Trust Officer

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.

Trust Officer

We are looking for an experienced trust and estate professional to establish relationships with clients to understand, manage and administer their complex plans and wishes.

Responsibilities

Trust File Management

- Establish and manage client/beneficiary/co-trustee relationships.
- Manage trust, estate and other fiduciary services, coordinating the application of any specialized expertise or services that may be required.
- Complete account-opening and closing procedures.
- Ensure all account information on internal systems is current, complete and accurate.
- Monitor client account activity and balances.
- Arrange for transfers of funds to / from third party investment managers.
- Monitor management plan adherence for guardianship accounts.
- Check fee calculations for trusts and estates as needed.

Client Relations

- Provide personalized service to clients/beneficiaries, exemplified by timely and accurate account administration.
- Demonstrate technical expertise, to identify needs and concerns of clients, their advisors and where applicable, the co-trustees.

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Administration

- Administer estates, trusts, power of attorney and agency accounts.
- Coordinate all administrative responsibilities prior to and after death of client and their estates.
- Review and collect accounts receivable for all active clients.
- Ensure completion of quarterly file audit.
- Facilitate and maintain internal audit procedures in conjunction with other Trust Department members.
- Contact service providers, government agencies and other related parties when necessary for account administration purposes.
- Participate and support other team members with previous experience and expertise.
- Mentor junior trust administrators to learn and understand trust and estate guardianship.

Skills

- Post-secondary education or equivalent industry experience with trust administration, legal administration and/or accounting.
- Experience in financial or trust services involving knowledge of trust accounting principles and systems.
- Expert estate and trust accounting and administration experience and knowledge of fiduciary responsibilities.
- Thorough knowledge of relevant estate, tax, trust, incapacity, business, family and charity law.
- Working knowledge of foreign jurisdiction connection issues and implications.
- Technical knowledge and fiduciary experience of estate and/or trust experience.
- Experience in financial or trust services involving knowledge of trust accounting principles and systems.
- Exceptional client relations experience dealing with confidential and complex intricacies.
- Enrolment in or completion of a professional designation/diploma (TEP, CETA, or MTI) preferred;
- Fluency in English required, fluency in Asian languages would be an asset.

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.