*At Raymond James, **we** develop, **we** collaborate, **we** decide, **we** deliver, and **we** improve together*.

Solus Trust Company (ST) is an affiliate company of Raymond James Ltd. (RJL), Canada's leading independent investment dealer offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs. ST provides personal estate, trust, and agency services to clients of RJL, its correspondent services clients as well to clients referred externally via Centers of Influence (COIs) and other financial institutions.

Associate Trust Officer

(Future Opportunities)

Click here to apply to this opportunity

How does this role impact the organization?

Working within the Trust Services Team, the Associate Trust Officer will report to the Associate Vice-President, Trust Services. You are a goal-oriented team player capable of managing a book of estate and trust accounts, while serving as a role model to the Trust Administrators on the team. You will ensure the ongoing delivery of premium service to our partners and their clients while simultaneously building and maintaining strong relationships with your internal RJL and external COI partners.

What will your role be responsible for?

- Responsible for the delivery and oversight of timely, accurate, and professional administration of estate, trust, and power of attorney accounts (both fiduciary and agency);
- Take ownership and demonstrate accountability for efficient resolution of client and partner inquiries and concerns;
- Exercise discretion afforded in the will, trust agreement, or power of attorney documents for clients where ST has been granted authority;
- Collaborate with Compliance, Operations, Legal and other related lines of business to resolve system, administrative, risk management and legal issues related to account administration;
- Participate in audit activities including business line oversight, internal audit, and regulatory audits and examinations where required;
- Contribute to the review and discussion of discretionary decisions on behalf of ST;
- Participate in the creation, modification, and implementation of policies and procedures where required;
- Build strategic relationships with COIs including lawyers, accountants, and financial advisors with a goal of enhancing their knowledge and willingness to work in collaboration with our trust business for the benefit of their HNW clients; and
- Fulfill other duties and projects as assigned.

What can you expect from us?

Our most important investment is in people. Upon eligibility, RJL offers flexible workstyles, a competitive compensation, and benefits package. Our benefits range from health benefits, RRSP matching program, employee stock purchase plan, paid time off, volunteer days, discretionary bonuses, tuition reimbursement, and many more! We also support internal promotion and community involvement.

Qualifications - External

What do we expect from you?

- Minimum 2 years of estate and trust industry experience (or other relevant industry);
- Preference given to experience managing estate, trust, and power of attorney accounts;
- Experience working with HNW clients and their wealth advisors;
- Strong communication skills and ability to work collaboratively and independently;
- Exceptional critical thinking and analytical skills to identify and resolve diverse, complex, and ambiguous issues in a timely and practical manner;

- In-depth knowledge of estates, trusts, and powers of attorney for property laws;
- University degree in related field;
- STEP or MTI designation would be an asset; and
- Intra-provincial travel may occasionally be

We encourage our associates at all levels to:

- Grow professionally and inspire others to do the same;
- Work with and through others to achieve desired outcomes;
- Make prompt, pragmatic choices and act with the client in mind;
- Take ownership and hold themselves and others accountable for delivering results that matter; and
- Contribute to the continuous evolution of the

Salary Range: $70,000 - 90,000 annually, in addition to competitive performance bonuses/incentives.

Actual compensation will be determined based on skills, experience, internal equity, and other job requirements.

This posting is for potential future hiring needs and does not represent a current vacancy.

At Solus Trust Company, we honor, value, respect the uniqueness, experiences, and backgrounds of all of our associates. When associates bring their best authentic self, our organization, clients, and communities thrive. It is part of our people-first culture. Our company is an equal opportunity employer and makes all employment decisions on the basis of merit and business needs.

We demonstrate our commitment to ensuring equal opportunities for all candidates. To request accommodations, candidates are instructed to contact Human Resources via email at recruitment@raymondjames.ca. By reaching out to this email address, candidates can communicate their specific requirements and discuss the necessary accommodations they may need to participate fully in the recruitment process.

We may use automated or AI-enabled tools to support parts of our recruitment and screening process, including screening, assessing or selecting applicants where applicable. These tools help us review applications efficiently, but they do not replace human decision-making.