



Indigenous.Link

Canada's fastest growing Indigenous career portal, Careers.Indigenous.Link is pleased to introduce a new approach to job searching for Indigenous Job Seekers of Canada. Careers.Indigenous.Link brings simplicity, value, and functionality to the world of Canadian online job boards.

Through our partnership with Indigenous.Links Diversity Recruitment Program, we post jobs for Canada's largest corporations and government departments. With our vertical job search engine technology, Indigenous Job Seekers can search thousands of Indigenous-specific jobs in just about every industry, city, province and postal code.

Careers.Indigenous.Link offers the hottest job listings from some of the nation's top employers, and we will continue to add services and enhance functionality ensuring a more effective job search. For example, during a search, job seekers have the ability to roll over any job listing and read a brief description of the position to determine if the job is exactly what they're searching for. This practical feature allows job seekers to only research jobs relevant to their search. By including elements like this, Careers.Indigenous.Link can help reduce the time it takes to find and apply for the best, available jobs.

The team behind Indigenous.Link is dedicated to connecting Indigenous Peoples of Canada with great jobs along with the most time and cost-effective, career-advancing resources. It is our mission to develop and maintain a website where people can go to work!

Contact us to find out more about how to become a Site Sponsor.

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Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/07/03

Business and Wealth Transition Specialist - Farming/Agriculture

| | | |
|--------------------|---|-------------------|
| Job ID | 199173-en_US-2103 | |
| Web Address | https://careers.indigenous.link/viewjob?jobname=199173-en_US-2103 | |
| Company | Scotiabank | |
| Location | Toronto, ON | |
| Date Posted | From: 2024-05-27 | To: 2050-01-01 |
| Job | Type: Full-time | Category: Finance |

Description

Requisition ID: 199173

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture.

Business and Wealth Transition Specialist (farming/agriculture background and experience)

Summary:

The Business and Wealth (BWT) Specialist is a key member of the Advanced Planning and Services group. The BWT Specialist is responsible for providing an integrated total wealth planning solution, and advisory support, to our Ultra High Net Worth (UHNW) and business owner clients. This includes leading the in-depth total wealth planning consultation process, coordinating the integration of other experts, and delivering comprehensive recommendations that lead to the deepening of existing, valuable client relationships and the acquisition of new UHNW clients.

Role Responsibilities

1. Take a lead role in driving business results through delivering an integrated planning total wealth planning solution for ultra-high net worth clients and business owners, including:

- Engaging in consultation meetings with clients or prospects and their RMs to identify opportunities where a client is having a transition event in their business and/or in their wealth;
 - Leading the discovery process to identify goals for business transition and ownership structures, family financial security, continuity, and legacy;
 - Undertaking a high-level assessment to understand current state, which may include a review of key personal and corporate information and relevant documents;
 - Where appropriate, undertaking a more thorough discovery and analysis, which may require discussions with client's outside professionals to ensure proper coordination, identifying both short-term and long-term gaps and opportunities, and presenting clients with recommendations that reflect an integrated and total wealth solution;
 - Where appropriate, preparing alternative strategies/scenarios (through the use of planning software and other tools); and
 - Providing information and direction on complex issues to TOE and SFPCs (in preparation of personal financial plans).
2. Build awareness, engagement and education of the BWT offer by:
 - Being proactive in internal and external communications around UHNW planning and business transition as a total wealth offering available throughout Scotiabank;
 - Providing regional support through the delivery of presentations, conference calls and one-on-one discussions with RMs/Advisors, TOE, etc.;
 - Reinforcing messaging and tactics being delivered by the Head Office BWT team;
 - Assisting in the development and/or delivery of client/prospect events;
 - Helping to identify target clients that would benefit from BWT engagements; and
 - Working closely with local sales management leaders to create awareness and identify opportunities to promote the BWT offering.

3. Build local relationships to strengthen BWT offer by:

- Developing a thorough understanding of the Scotiabank Team of Experts (TOE) offerings and strong working relationships with local partners;

- Coordinating TOE integration throughout applicable advanced planning engagements – these experts would include any of: Insurance Consultants, Will & Estate Planners, Trust Officers, Philanthropy Specialists, Private Bankers, Insurance Financing Specialists, Debt & Equity Financing Specialists, and Commercial Bankers; and
- Developing and managing local relationships with external specialists and engaging them as part of the advanced planning process, as required, which may include any of: niche tax specialists, business consultants, business valuers, family facilitators, and legal experts.

4. Contribute to the effective functioning of the BWT team by:

- Assisting in the development and testing of processes, policies and other tools to continue to build and enhance the BWT offering;
- Participating actively in team learning development activities, and team performance achievements;
- Building effective working relationships across the team, and with various business line and corporate function contacts;
- Ensuring the delivery of an excellent and consistent client experience;
- Facilitating a culture of open and honest communication;
- Actively participating and contributing to touch bases and team meetings;
- Encouraging the generation of new ideas and approaches;
- Actively sharing knowledge and experience to enhance the development of all team members; and
- Developing and executing a meaningful employee development plan.

Education/Work Experience/Designations:Musts:

- University degree
- Professional designation (CPA,CA)
- CICA In-Depth Tax Course
- Farming background with a deep understanding of the farming environment
- Minimum ten years’ experience delivering advanced planning solutions, and/or consulting to business owners, specifically to owners in the agricultural and farming community.

Desirables:

- Family Enterprise Advisor Program
- Accredited financial planning designation (CFP, RFP, PFP, PI. Fin -IQPF applicable for Quebec)
- CICA Advanced Tax Issues for the Owner-Managed Business Course
- Life Insurance license

Location(s): Canada : Ontario : London || Canada : Alberta : Calgary || Canada : Manitoba : Winnipeg || Canada : Ontario : Guelph || Canada : Saskatchewan : Saskatoon

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please click [here](#). Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview will be contacted.

For more information, visit [Scotiabank for Business and Wealth Transition Specialist - Farming/Agriculture](#)