



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.

Corporate Headquarters:
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Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/04/25

Trust Assistant

Job ID	F6-48-A1-6F-1C-C3
Web Address	https://careers.indigenous.link/viewjob?jobname=F6-48-A1-6F-1C-C3
Company	BMO Financial Group
Location	Kelowna, British Columbia
Date Posted	From: 2022-11-24 To: 2023-01-23
Job	Type: Full-time Category: Finance
Job Start Date	As soon as possible
Languages	English

Description

Provides high quality sales and service to Trust & Estate clients to deliver an exceptional client experience. Provides technical expertise for all aspects of Trust & Estate account management and administration to ensure compliance. Works collaboratively within the branch and the regional team as part of the client/relationship management solution. Identifies and makes referrals to other business groups as appropriate.

Assists in preparing new business proposals or presentations to clients/prospects based upon their needs.

Develops a rapport and instills confidence with the client to develop credibility as a member of the client / relationship team.

Develop and maintain knowledge and understanding of integrated services and offerings, with a focus on Trust and Estate products and procedures.

Coordinates and executes specific activities for the implementation of strategic initiatives; includes tracking metrics and milestones.

Collaborates with internal and external stakeholders in order to deliver on business objectives.

Performs set up & maintenance of Trust & Estate accounts ensuring all compliance requirements are met within acceptable time frames.

Ensures the timely and accurate processing of trade order management activities.

Supports in audits and compliance reviews as assigned.

Identifies and escalates all irregularities and discrepancies to management.

Performs sales & service support activities as required to meet client needs and maintain overall service levels.

Provides administrative support to team members and relationship managers that includes financial reports, asset & account reconciliation, compliance, trade activity, posting, fee collection and other related activities; ensures proper documentation and administration decisions.

Meets high-quality service standards to maximize relationship retention and growth.

Develops rapport and instills confidence with the client to develop credibility and earn their trust.

Follows through on the risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, act in their best interests, and ensures an effectively run function.

Protects the Bank's assets and complies with all regulatory, legal and ethical requirements.

Completes complex & diverse tasks within given rules/limits and may include handling escalations from other employees.

Analyzes issues and determines next steps.

Broader work or accountabilities may be assigned as needed.

Qualifications:

Typically between 2 - 3 years of relevant experience and post-secondary degree in related field of study desirable or an equivalent combination of education and experience.

Basic knowledge of Estate and Trust products and services.

Trust industry experience.

Applicable securities certification.

Specialized knowledge.

Verbal & written communication skills - Good.

Organization skills - Good.

Collaboration & team skills - Good.

Analytical and problem solving skills - Good.

We're here to help

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life. It calls on us to create lasting, positive change for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one - for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset.

To find out more visit us at <https://jobs.bmo.com/ca/en>.

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.

Note to Recruiters: BMO does not accept unsolicited resumes from any source other than directly from a candidate. Any unsolicited resumes sent to BMO, directly or indirectly, will be considered BMO property. BMO will not pay a fee for any placement resulting from the receipt of an unsolicited

resume. A recruiting agency must first have a valid, written and fully executed agency agreement contract for service to submit resumes.

How to Apply

Click " Apply Now"