



Personal Trust Officer

Location: Saskatoon
Reporting to: Senior Personal Trust Officer

The primary purpose of the position is to deliver operational and technical expertise for administration Personal Trust and Estate administration files. The Trust Administration department specifically focuses on providing estate and trust administration to clients nationwide. We work with credit unions through our Member Trust Services, Estate Trust Referral and EASE Programs to promote our trust services.

Responsibilities

- Ensure the administration of assigned files are dealt with in accordance within understood product guidelines and parameters and posted service standards for accuracy and timeliness.
- Ensure the delivery of quality client service by responding to assigned client requests within posted service standards, meeting reasonable client expectations and handling client complaints or concern resolutions
- Ensuring risks are controlled within file administration, client statements and client service by reviewing department policy, procedure documents and other related manuals for accuracy and to ensure in accordance with applicable legislation and the common law, performing individual file audits as assigned and escalating relationship management and file administration issues as appropriate

Qualifications

- Completion of 1 – 2 years post secondary degree
- Completion of or enrollment in Specialist, Trust Institute (STI) through Canadian Securities Institute (CSI) or in Trust and Estate Practitioner (TEP) program through Society of Trust and Estate Practitioners (STEP) or equivalent.
- Four years of progressive experience in Personal Trust and Estate administration.
- Advanced understanding in the administration of Estates, Trusts and Personal Administration accounts in addition to any Personal Trust programs.
- Working knowledge of the common law and provincial legislation and federal taxation as it applies to Personal Trust Administration

Submit your resume and cover letter in confidence stating **Competition Number 0912-59 by Tuesday January 5, 2010** to:

Concentra Financial – People Office
333 3rd Avenue North
Saskatoon, Saskatchewan S7K 2M2
Email to: peopleoffice@concentrafinancial.ca

We thank all applicants for their interest; however, only those selected for an interview will be contacted.