

As one of Canada's Best Managed Companies for 14 consecutive years, Concentra prides itself on fostering employee engagement and a workplace of openness and respect.

Concentra is Canada's leading provider of wholesale banking and trust solutions to credit unions from coast to coast. With deep co-operative roots, Concentra is focused on creating value for the credit union system. We partner with credit unions to ensure over five million Canadian members can choose competitive financial services from their local credit union.

Concentra Trust – a wholly-owned subsidiary – has been delivering estate and trust services nationwide for over 65 years.

Concentra employees enjoy a competitive total rewards package and flexible work environment. We are looking for a results oriented individual to join our team in our [[location]] location.

## **Corporate Trust Specialist**

(Full-time, Permanent Position)

The Corporate Trust Specialist is primarily responsible to support and deliver operational and technical expertise through administration, and to mitigate risk associated with the delivery of corporate trust administration including, but not limited to; bond/debenture/share offerings, escrow arrangements, Funeral/Cemetery Trusts, Insurance Trusts, customized trust arrangement, custodian arrangements and deferred trustee products.

### **Key Outcomes:**

- The Corporate Trust Specialist is responsible to deliver operational and technical expertise as it relates to corporate trust administration, including the execution of trades, reviewing of portfolios to ensure consistency with the Investment Policy set for the account and ensuring the release of funds is consistent with the contract arrangement.
- Participate in the review and negotiation of contracts, assessing the responsibility, risk and viability of new business.
- You will also be responsible to review individual trust agreements to respond to client inquiries and establish new procedures as required for customized administration.
- Review all tax returns and file returns within appropriate time lines.
- Ensure risks are controlled by adhering to policies and procedures, corporate manuals and applicable legislation. You will also identify data system requirements for core system control enhancements.
- Maintaining a high level of knowledge of corporate trust products and services is essential to ensure a quality client experience. You will also handle client complaints, escalating concerns for resolution as deemed appropriate.

### **Qualifications:**

- Successful completion of a post secondary degree or certificate program, preferably with courses pertaining to business and law.
- Enrollment in applicable courses offered through STEP or CSI and completion of the Canadian Securities Course
- 5 years of progressive experience in the Financial Services Industry, with exposure to Trust products and services.
- A combination of education and experience will be considered.

Position closes **Monday, February 12, 2018**

To apply, please visit our Career page at [www.concentra.ca](http://www.concentra.ca)

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