ODLUM BROWN
Investing for Generations®

ODLUMBROWN.COM

Team Lead, Estate and Trust – Vancouver

This year, Odlum Brown celebrates its 99th anniversary as an independent, employee-owned, full-service investment firm. We are honoured to be recognized as one of Canada's Best Managed Companies for 23 consecutive years and as one of Canada's Most Admired™ Corporate Cultures.

CULTURE AND VALUES

We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. In 2020, Odlum Brown was the recipient of the Canada's Volunteer Award in the Business Leader category for British Columbia and the North. This national recognition by the Canadian government is the result of our team members' actions and continued support for various causes and organizations in our communities. We are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a Team Lead, Estate and Trust to join our award-winning firm in the Vancouver office.

Reporting to the Supervisor, Estate and Trust, we are seeking an experienced subject-matter expert, with a strong knowledge of estate and trust requirements. The ideal candidate is committed to client service excellence, detail oriented and driven to provide exemplary support to advisory groups in a fast-paced environment. This role requires a critical thinker and skillful decision maker, who can quickly adapt in a continuously changing regulatory environment.

RESPONSIBILITIES

- Provide expert advice in processes and best practices related to estate and trust account documentation, tax reporting and administration to advisors and their teams
- Deliver client service excellence by responding to inquiries accurately and in a timely manner
- Partner with Compliance, New Accounts and Financial Services departments to remain current on new developments in estate and trust, anticipate impact to existing processes and execute changes as required
- Communicate department initiatives, changes and updates to team members

- Review and audit client account applications and information, in accordance with rules and regulations related to compliance, tax, estate and trust
- Ensure standard operating procedures are followed and service level agreements are met in a fast-paced, service-driven environment
- Maintain up-to-date knowledge of the estate and trust industry by participating in relevant meetings and seminars
- Identify opportunities to streamline processes for operational efficiencies and collaborate with team members to document new and existing processes
- Engage in continuous learning and development to increase knowledge as a subject-matter expert
- Participate in cross-functional department reporting, audit and review projects

KNOWLEDGE AND EXPERIENCE

- Minimum of six years of investment industry experience in Estate and Trust or similar function
- People leadership experience building an interactive, supportive, high-functioning team is a strong asset
- Expertise in advising a portfolio of internal clients and committed to delivering service excellence
- Ability to exercise good judgement and decision making within a policy and regulatory framework
- Self-starter and continuous learner with the capacity to work independently, along with flexibility and willingness to assist others
- Critical thinker and skillful decision maker, adaptable in a changing regulatory environment
- Excellent organizational skills, able to prioritize important and time-sensitive tasks
- Ability to work efficiently and accurately in a fast-paced, dynamic environment with a sharp eye for detail
- Strong communication and presentation skills
- Experience with the Broadridge Dataphile platform or similar bookkeeping system
- Proficiency in MS Office (Word, Excel and Outlook)
- Completion of MTI, CETA or TEP courses considered an asset

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this job, we invite you to submit a cover letter and resume to hr@odlumbrown.com by **August 26, 2022**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.