



**Position Title:** Estates Administrator (Bilingual)

**Location:** Toronto, Ontario

**Reporting To:** Manager, Registered Products

**Position Overview:** The ideal applicant will be responsible to ensure all processing complies with AML standards, CRA and Pension regulations. This individual will work as part of highly motivated team, and is willing to deliver “best in class” service.

**Duties and Responsibilities:**

- Processing of Estate account opening documents
- Processing of Estate payouts (Registered Plan accounts and Non Registered accounts)
- Preparing manual tax receipts (Registered Plan accounts)
- Submission of Registered Plan estate documents to Computershare for processing approval
- Communicate with branches, internal departments, Computershare’s, compliance regarding related enquiries
- Awareness of policy changes in connection to Estates
- Preparing Queries to produce various reports pertinent to Estates
- Prioritize work flow to avoid escalations
- Various administrative tasks – filing, editing, faxing etc.
- Perform additional Registered Plan duties which may arise from time to time

**Qualifications:**

- Minimum 5 Years of experience in estate settlements
- Bilingual (English and French) both written and verbal
- The individual must have strong knowledge of RRSP, RRIF, LIRA, RESP and TSFA and Estate regulations and procedures
- Experience using Dataphile will be an asset but not required
- Ability to work with minimal supervision, being proactive and able to make suggestions which will improve daily processing areas
- Intermediate knowledge of Microsoft Word, Excel, Outlook
- Good verbal, written and interpersonal communication skill to effectively communicate and resolve issues
- Good time management and analytical skills
- Team builder and willingness to work in a team environment

**Education:**

- Post-secondary education or College degree required
- Canadian Securities Course (CSC), will be an asset