ODLUM BROWN
Investing for Generations®

ODLUMBROWN.COM

Estate and Trust Administrator – Vancouver

FIRM OVERVIEW
Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES
Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant culture that we have built and sustained for many years. These values are the cornerstone of our culture and the 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. A recipient of a Canada's Volunteer Award from the Government of Canada, 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.

OPPORTUNITY
We have an opportunity for an Estate and Trust Administrator to join our award-winning firm in the Vancouver office.

RESPONSIBILITIES
- Collect, review and record client information and estate and trust account documentation
- Process, track and report on estate and trust accounts
- Exercise estate and beneficiary disbursements from related accounts
- Issue tax slips to estate and trust accounts
- Provide estate and trust account support to advisory teams
- Work closely and collaboratively with team members across the firm

KNOWLEDGE AND EXPERIENCE

- Minimum one (1) year's experience with estate and trust accounts and tax reporting
- Excellent verbal and written communication skills
- Ability to exercise good judgement and decision making within a policy and regulatory framework
- Strong attention to detail and organizational skills, able to prioritize important and time-sensitive tasks
- Self-starter with the capacity to work independently, along with flexibility and willingness to assist others
- Results-oriented, with the ability to take initiative and seek out information where required
- Experience in a financial institution is an asset
- Proficient with Microsoft Office programs with intermediate to advanced Excel skills
- MTI® Estate & Trust Professional designation is an asset
- Experience with the Broadridge Dataphile platform or similar bookkeeping system is an asset

At 100 years young, 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 role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **March 29, 2023.**

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.