NORTHERN BIRCH CREDIT UNION

Estate Services Specialist

Position Detail

Job Type: Full-Time, Permanent, One (1) New Vacancy
Hours of Work: 37.5 hours per week
Location: Flexible across our Toronto branch network
Work Arrangement: Remote work available based on operational requirements; primarily in-person

About Us

Northern Birch Credit Union is a community-based financial services cooperative serving our member communities for over 75 years. With over $200m in assets, a strong capital base, and a dedicated team, we are entering a period of transformation to expand our personalized, competitively priced services to new communities and to take advantage of the technological evolution underway in Canadian financial services.

We are building a nimble entrepreneurial culture that promotes financial and technological fluency and is grounded in core cooperative values: respectful of the individual, collaboration, and social responsibility.

Our mission is to provide for the financial well-being of our members and to contribute to building stronger member communities. We focus on knowing our members and serving their evolving financial needs over their lives. We provide financial and leadership support to community initiatives.

About the Role

As Northern Birch continues to evolve, we are seeking a detail-oriented and service-focused professional to join our Member Services team as an Estate Services Specialist.

This role serves as a primary resource for members, executors, beneficiaries, family members, and authorized representatives navigating the financial aspects of settling an estate. You will manage the estate files from initial notification through settlement, including meeting face-to-face with members and estate representatives, reviewing documentation, explaining requirements and next steps, and coordinating the appropriate administration of member accounts.

The successful candidate will bring a compassionate and professional approach to sensitive conversations while ensuring estate matters are handled accurately, efficiently and in accordance with legal, regulatory and internal requirements.

In addition to the role's primary focus on estate services, you will provide specialized deposit and operational support to the Member Service team, as capacity permits, including deposit administration, broker deposit support and other back-office activities.

Why Join Us?

- Make a meaningful impact by supporting members and families through important life events
- Become a key resource for estate services across the credit union
- Build expertise in estate administration and specialized financial services
- Collaborate with an experienced and supportive team

- Grow your career through continuous learning and development

Key Work Activities:

- Serve as the primary point of contact for executors, beneficiaries, family members and authorized representatives throughout the estate settlement process.
- Conduct face-to-face meetings with estate representatives to review documentation, explain requirements and next steps, and provide guidance throughout the administration of an estate.
- Manage estate files from initial notification through settlement, ensuring appropriate documentation, follow-up and timely resolution
- Review and process estate documentation, including death certificates, wills, probate documentation, powers of attorney and other supporting legal documents.
- Coordinate account restrictions, closures, transfers, and distributions in accordance with applicable legal requirements, internal policies and appropriate authority.
- Communicate regularly with estate representatives regarding outstanding requirements, file status and next steps.
- Work collaboratively with Member Services, Wealth, Finance and other internal or external partners to resolve estate matters.
- Maintain complete and accurate estate records, documentation, correspondence and audit trails.
- Identify opportunities to strengthen and standardize Northern Birch's estate processes and improve the experience provided to members and their families.
- As capacity permits, provide specialized deposit and back-office operational support including account administration, deposit servicing and related member requests.
- Provide Administration support for broker deposit activities and coordinate with Finance and other internal stakeholders as required.
- Support operational reporting, reconciliations, month-end/year-end activities and other Member Services administration as assigned.
- Ensure all responsibilities are completed in accordance with applicable legislation, regulatory requirements, privacy requirements, and Northern Birch policies and procedures.

Experience

- Post-secondary education in business, finance or a related discipline.
- 5 years of experience in a financial institution, with experience in estate administration, deposit services, or member/client service considered an asset.
- Demonstrated experience working directly with members or clients, including conducting in-person meetings and navigating sensitive or complex conversations
- Strong understanding of financial institution operations, account administration and deposit products.
- Strong organizational skills with the ability to manage multiple detailed files and competing priorities.
- Excellent written and verbal communication skills with a collaborative, member-focused approach.
- Strong judgement, discretion, and attention to detail.
- Proficiency with Microsoft Office applications and banking systems.

Assets

- Credit union experience
- Strong familiarity with estate services, probate documentation, and powers of attorney.
- Experience with deposit reporting, reconciliations, and regulatory reporting.
- Experience with the DNA banking system is considered an asset.
- Proficient in Estonian or Latvian is considered an asset.

Compensation and Benefits

$58,000 to $65,000 annually

Northern Birch Credit Union offers a comprehensive total rewards package, including:

- Annual performance bonus
- Comprehensive health and dental benefits
- Employer-sponsored retirement savings program
- Paid vacation and personal days
- Professional development opportunities

The starting salary will be determined based on the successful candidate's qualifications, experience, internal equity, and organizational needs.

How to Apply?

Submit your résumé and cover letter to careers@northernbirchcu.com

The successful candidate must successfully complete a background check, be bondable and be legally eligible to work in Canada.

Northern Birch Credit Union does not use artificial intelligence (AI) to screen, assess, or select applicants. Applications submitted through third-party job boards may be subject to the job board's own screening tools.

Northern Birch Credit Union is committed to providing accommodations throughout the recruitment process in accordance with the Ontarians with Disabilities Act (AODA). Applicants requiring accommodations are encouraged to notify us at any stage of the recruitment process.

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

Recruitment records are retained in accordance with applicable Ontario legislation.