ECHELON

WEALTH PARTNERS

JOB TITLE: Branch Manager

LOCATION: Toronto

INDUSTRY: Financial Services

REPORTING TO: Chief Executive Officer

POSITION OVERVIEW:

Reporting directly to the Chief Executive Officer, the Branch Manager for Toronto will be ultimately responsible for overall Operations, Performance, Culture, Profitability, People Management and Development of the Toronto Branch. The Branch Manager will be required to meet or exceed revenue targets and margins as applicable to the branch, operate the branch in a profitable and growth oriented manner, coach and develop Investment Advisors and other key branch staff, while continuing to maintain and build her/his individual client base.

CORE DUTIES & RESPONSIBILITIES

- Cultivate trust and build strong relationships both internally and externally with all clients, the branch, national colleagues and corporate teams
- Actively champion corporate initiatives around strategic objectives, fiscal planning, performance management and executive communications
- In cooperation with the Compliance department, with the support of the Branch Administrator, ensure that compliance issues are handled effectively, and that corrective actions are aligned with regulatory requirements
- Initiate, lead, and manage initiatives resulting in a positive impact on branch performance i.e. financial and/or operational performance
- Proactively lead and implement sales campaigns within the branch, tailoring them as required (to local markets, conditions, Advisors), to achieve branch revenue targets
- Provide sales leadership to Advisors where required
- Manage individual client base by determining individual investment needs and providing professional, customized advice to ensure clients' financial goals are met
- Identify and build out new clients through referrals and increasing local brand visibility
- Prepare and give business reviews to the senior management team regarding progress and roadblocks to establishing new engagements
- Occasional travel within Canada is required. Occasional international travel as needed.

REQUIRED EXPERIENCE, EDUCATION and ATTRIBUTES

- Undergraduate degree (B.A., BSc.) in any discipline
- Minimum 10+ years of experience within a sales/brokerage industry environment, preferably with 5+ years in a sales leadership role
- At least 6+ years of branch management experience with an IIROC member firm
- At least 2 years as a Registered Representative in good standing with IIROC
- Completion of Branch Managers Examination & Options Supervisor Course
- Demonstrated track record of leadership skills with ability to direct, mentor and motivate sales teams
- Outstanding relationship-building and interpersonal skills across all levels/functional groups
- Exceptional verbal, non-verbal and written communication skills
- Ethical, trustworthy and fully committed to supporting business objectives while ensuring all regulatory and compliance controls are maintained at all times
- Internally aligned with Echelon's values and pillars

Application instructions:

To submit your application, please copy and paste this link into your browser https://echelonpartners.bamboohr.com/jobs/view.php?id=11 and click "Apply for this Job". We thank all applicants for their response but only those considered for an interview will be contacted.