Assante
WEALTH MANAGEMENT

ABOUT US

Founded in 1995, Assante Wealth Management is a wholly owned subsidiary of CI Financial and one of Canada's largest wealth management firms. Our 750 professional advisors, located in communities throughout the country, oversee approximately $39 billion in assets for more than 300,000 clients. Assante Wealth Management's services include investment management, retirement planning, tax planning, insurance and estate planning.

POSITION: Financial Advisor, National Accounts
LOCATION: Calgary, AB
STATUS: Full-time (Salaried Position)

JOB OVERVIEW

We are currently seeking a **Financial Advisor** to join our **National Accounts** team. In this role, the successful candidates will be responsible for servicing and growing client relationships. Working in both an individual and team oriented environment, you will use your organizational, financial and investment knowledge and exceptional communications skills to provide advice and service to new and existing clients.

New advisors are expected to advise clients on products and services available to them that best suit their needs. They will be responsible for servicing an existing book of assets that they are expected to grow. This will be done through generating referrals, networking and supporting advisors and branches in their territory.

WHAT YOU WILL DO

- Service and proactively develop relationships with clients who typically have less than $100,000 of investible assets through phone contact, correspondence and in person meetings
- Cultivate new business through consolidation of assets and referrals from existing clients and advisors in the territory
- Establish a regular savings and investment program for clients by helping them identify goals and identify basic financial planning needs which are periodically reviewed and updated
- Make suitable investment recommendations including promoting the benefits of managed money solutions to clients and prospects
- Adhere to all compliance and regulatory requirements
- Provide timely information, investigate and resolve client issues and initiate follow up on research efforts
- Ability to work independently and in a team environment

WHAT YOU WILL BRING

- A minimum of two (2) year sales and client service experience within the investment industry
- Experience with Salesforce and Naviplan a strong asset
- Post-secondary education
- Current registrant of an IIROC of MFDA member firm
- Insurance License and CFP designation an asset

- Must demonstrate excellent knowledge and understanding of the relevant securities legislation and SRO rules and regulations
- Proven skills in financial literacy and/or advice capacity with the ability to educate and convey important financial goals and concepts to prospects and clients.
- Strong client service, prospecting and cross-selling skills to build/maintain relationships with prospects, clients and colleagues in verbal, written and presentation mediums
- Ability to meet deadlines and work effectively under pressure
- MS Office Suite (Word, Excel, Outlook & PowerPoint) and proficiency in industry software and CRMs a must

This opportunity will prepare an aspiring Financial Advisor to service client relationships under a corporate program with the potential of becoming part of an independent team based practice. We will provide the incumbent with various means of training, including, job-shadowing, e-learning, one-on-one coaching, and on-the job training to set them on a path of success with the company.

If you are a passionate, committed and dynamic individual, please submit your cover letter and resume to our Careers site on:

https://www.workopolis.com/jobsearch/job/17962836

Please also indicate in your online application where you have viewed this posting. Thank you.

Only qualified candidates selected for an interview will be contacted.

CI Financial Corp. and all of our affiliates ("CI") are committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at accessible.recruitment@ci.com, or call 416-364-1145 ext. 4747. **If you are contacted by CI** regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.