ABOUT US
Founded in 1995, Assante Wealth Management is one of Canada's largest firms providing wealth management solutions. Our 830 professional advisors, located in communities throughout the country, have approximately $43 billion of Canadian's family wealth under their care.

POSITION: Financial Advisor
LOCATION: Vancouver, BC
STATUS: Full-time

JOB OVERVIEW

We are currently seeking a Financial Advisor to join our National Accounts team. In this role, the Financial Advisor will develop and maintain the relationships for the Assante Capital Management book of business. Working in a team-oriented environment, you will use your organizational, investment knowledge and exceptional communications skills to provide advice and service existing or new clients with their portfolio of in-house products.

WHAT YOU WILL DO
- Service and proactively develop relationships with new and existing clients 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
- Minimum of 2 years' sales and client service experience within the investment industry
- Strong knowledge of financial markets with a thorough understanding of Mutual funds
- Strong client service skills – required to build/maintain relationships with clients, employees and management
- Sales ability to handle outbound calls/meetings to/with existing clients.
- Post-secondary education, and Canadian Securities Course a must. Insurance, CFP, CIM & other licensing an asset
- Must demonstrate excellent knowledge and understanding of the relevant securities legislation and SRO rules and regulations
- Excellent communication skills: verbal, written and presentation
- Detail oriented, professional and analytical, positive attitude and genuine commitment to client service

WHAT YOU CAN EXPECT FROM US

Assante
WEALTH MANAGEMENT

Our dedication to the Employee Experience at CI is aimed at supporting, empowering and inspiring our talented team through:

- Recognition & Compensation
- Training & Development
- Health & Well-being
- Communication & Feedback

If you are a passionate, committed and dynamic individual, please submit your resume in confidence through our careers page at:
https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=8af61d30-ce97-4d97-af7d-bda5fa023504&jobId=286754&lang=en_CA&source=CC3&ccId=19000101_000001

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.