



Senior Fund Wholesaler

The Harbourfront Group of companies is a fast growing, independently owned group with offices across Canada. The firm specializes in creating complete wealth management solutions for high net worth clients.

Our funds are exclusively available to Harbourfront advisors, which means no more difficulties with obtaining access to your prospective clients. The candidate will be an integral part of the Business Development team, with responsibilities that will grow with us. The responsibilities of this role are wide-ranging and include the requirement to travel on short notice.

It will be your responsibility to:

- Perform pro-active call and sales campaigns to promote Willoughby Asset Management's product offerings to existing and potential clients
- Respond to inquiries on products, fund management strategies, portfolio manager philosophies/processes/styles and industry trends
- Develop sales campaigns and assist in delivery of sales presentations, in partnership with Portfolio Managers
- Provide sales strategies, concepts, marketing ideas and support to financial advisors
- Proactively prospect/identify financial advisors who are interested in Willoughby Asset Management Investment funds and are open to incorporating our funds into their book of business; internal wholesalers will be required to understand the goals, expectations and needs of advisors by utilizing a consultative, question-based sales process
- Book meetings for the VP, Sales with qualified advisors who are interested in incorporating Willoughby Asset Management solutions into investor portfolios
- Maintain a comprehensive understanding of our funds, market trends, advisor trends and investor trends
- Work closely with and support efforts of other team members
- Update daily call activities and maintain accurate advisor records within Salesforce on a timely basis
- Achieve annual activity productivity targets in the areas of: proactive calls, Know Your Advisor information and meetings booked as set by the CEO
- Other duties and projects as requested

The ideal candidate for this position will:

- ✓ Be familiar with brokerage firm and asset management firm operations, objectives and initiatives
- ✓ Have considerable knowledge of and experience in the financial services industry
- ✓ Possess a high level of interpersonal skills along with the ability to operate in a dynamic, fast-paced environment
- ✓ Have a minimum of 5 years financial services industry experience in a sales capacity
- ✓ Be willing to travel extensively to Advisor offices within Canada to establish valuable working relationships and improve onboarding efficiencies
- ✓ Possess effective problem analysis and resolution skills



HARBOURFRONT WEALTH MANAGEMENT INC.

- ✓ Have exceptional written and oral communication skills to interact professionally with individuals both within the firm and outside
- ✓ Be exceptionally flexible, with the ability to manage time and adjust shifting priorities while meeting deadlines
- ✓ Be a self starter, leader and motivator
- ✓ Have working expertise in MS Office (Outlook, Word, Excel, PowerPoint)
- ✓ Have financial services designations (e.g. CSC, CFP, CIM, CFA)

This is an exciting role with great potential for growth. If you are interested in this excellent opportunity, please send an email to: HR@harbourfrontwealth.com.

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company. Employment is contingent on the satisfactory completion of a pre-employment background check.

This posting will remain open until a qualified candidate is hired. We sincerely thank all applicants who express an interest in this role but wish to let you know that we will only be contacting applicants that are aligned with our requirements.