



<https://intscanada.com/job/investment-specialist-associate/>

INTS CONSULTING - Investment Specialist Associate

Description

Requisition ID: 150423

Tangerine is Canada's leading direct bank. We offer flexible and accessible banking options, innovative products, and award-winning Client service. The reason why Tangerine employees come to work each day is to help Canadians live better lives. We focus on making a difference in our communities, and that includes our own internal community. It's important to us that our employees feel empowered and enthusiastic about belonging to our Orange culture.

As a Scotiabank **Investment Specialist Associate**, you will be able to learn the intricacies of financial planning by working alongside seasoned Investment Specialists. You will have an opportunity to master the skills required to build long-lasting client relationships - with the goal to progress into an Investment Specialist within six months.

In this role, you will learn, practice and apply the skills and knowledge required to confidently transition to an Investment Specialist position. This includes a focus on developing new wealth management business relationships, cross selling and up-selling to existing clients to ensure investment portfolio growth, revenue generation and meeting defined goals.

Is this role right for you? In this role, you will:

Learn and master the skills to promote the development and sustainable growth of proprietary investment business by:

- Developing and implementing a structured business development strategy.
- Developing strategic sales plans for prospects and existing clients.
- Conducting outbound communications and cold-calling to prospects to remain top-of-mind for future business opportunities.
- Providing clients with an initial review of their existing financial plan or creating a new financial plan.
- Conducting complimentary needs analysis across several financial statements, including competitor statements.
- Conducting market research to understand market trends.
- Building and maintaining a market profile in the assigned market area.
- Participating in local professional and community events and associations to develop your network.
- Identifying opportunities to deliver community information sessions and financial seminars to grow prospects.
- Networking with investment industry specialists while managing a small

Hiring organization

INTS Consulting

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