

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

??????-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 upselling 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

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- budget for independent marketing-based activities.
- Identifying additional investment business development opportunities and facilitating the implementation of an investment solution and/or referral to the appropriate Wealth Management partners.
- Facilitating a culture of open and honest communication by actively participating and contributing to one-on-one touch bases and meetings with team members.

Do you have the skills that will enable you to succeed in this role? We'd love to work with you if you have:

- · Post-secondary education in Business or related field
- You're a mutual funds certified professional. You have current accreditation and good standing for MFDA licensing requirements (Investments Funds in Canada or Canadian Securities Course).
- You are actively working towards a Financial Planning designation. You will be required to complete the education requirements towards a Personal Financial Planning (PFP®) designation and/or a Certified Financial Planner (CFP®) designation within 6 months.
- Highly effective verbal and written communication skills.
- Ability to work independently as a self-motivated entrepreneur.
- An understanding of the Brokerage / Wealth Management and Online Brokerage environments.
- A valid driver's license and access to a vehicle, to travel to meet clients and prospects within the designated district.
- Second language an asset depending on target markets.

What's in it for you?

- An entrepreneurial culture with the freedom to develop your career.
- Access to leading-edge resources to support your growth including dedicated marketing support, powerful mobile technology, leading CRM, portfolio, and financial planning software.
- The ability to build long-lasting client relationships through exceptional advice and service.
- Ability to provide an excellent client experience without going to the branch.
- A partnership with our branches and access to Scotia Global Asset Management to deliver an exceptional client experience.
- A work culture that promotes diversity, respect, and inclusion.

Location(s): Canada: Ontario: Etobicoke

At Tangerine we value the unique skills and experiences each individual brings to the team, and are committed to creating and maintaining an inclusive and accessible environment. If you require accommodation during the recruitment and selection process, please let our Recruitment team know.