



Indigenous.Link

Canada's fastest growing Indigenous career portal, Careers.Indigenous.Link is pleased to introduce a new approach to job searching for Indigenous Job Seekers of Canada. Careers.Indigenous.Link brings simplicity, value, and functionality to the world of Canadian online job boards.

Through our partnership with Indigenous.Links Diversity Recruitment Program, we post jobs for Canada's largest corporations and government departments. With our vertical job search engine technology, Indigenous Job Seekers can search thousands of Indigenous-specific jobs in just about every industry, city, province and postal code.

Careers.Indigenous.Link offers the hottest job listings from some of the nation's top employers, and we will continue to add services and enhance functionality ensuring a more effective job search. For example, during a search, job seekers have the ability to roll over any job listing and read a brief description of the position to determine if the job is exactly what they're searching for. This practical feature allows job seekers to only research jobs relevant to their search. By including elements like this, Careers.Indigenous.Link can help reduce the time it takes to find and apply for the best, available jobs.

The team behind Indigenous.Link is dedicated to connecting Indigenous Peoples of Canada with great jobs along with the most time and cost-effective, career-advancing resources. It is our mission to develop and maintain a website where people can go to work!

Contact us to find out more about how to become a Site Sponsor.

Corporate Headquarters:

Toll Free Phone: (866) 225-9067

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Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/04/28

Investment Specialist / Financial Planner - Coquitlam, BC

Job ID 137807-en_US-9803

Web Address

https://careers.indigenous.link/viewjob?jobname=137807-en_US-9803

Company Scotiabank

Location Coquitlam, BC

Date Posted From: 2022-01-25 To: 2050-01-01

Job Type: Full-time Category: Finance

Description

Requisition ID: 137807

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture. Investment Specialist As an Investment Specialist, you will focus on developing and deepening client relationships by providing high quality advice and service within the mass affluent market. Following a comprehensive financial planning framework, you will be responsible for driving investment sales and new client acquisition, while adhering to Global Sales Principles, compliance and regulatory requirements as well as establishing business development opportunities with prospects and clients within the assigned market area. Key Accountabilities Promote the development and sustainable growth of proprietary investment business in the assigned market area by:

- Executing on business development plans for prospects and existing clients within the mass affluent market
- Conducting outbound communications and proactive calling to prospects to remain top-of-mind for future business opportunities
- Providing client-centric investment solutions through a financial planning framework, aligning with Global Sales Principles
- Conducting complimentary needs analysis across several financial statements, including competitor statements
- Building and maintaining a market profile in the assigned market area
- Participating in local professional and community events and associations to develop and expand your network
- Identifying opportunities to deliver community information sessions and financial seminars to grow prospects
- Networking with investment industry specialists while managing a small 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 partners
- Facilitating a culture of open and honest communication by actively participating and contributing

on team touch bases and meetings with colleagues

Desired Skills & Experience

- Post-secondary education in Business or related field
- Financial Planning Designation (FPF) or Certified Financial Planner (CFP)
- Mutual Fund License
- 3+ years of financial planning and investment sales experience
- Proven networking, client acquisition and interpersonal skills; experience building and maintaining Centres of Influence (COIs)
- Advanced knowledge of practical sales techniques and prospecting
- Highly effective verbal and written communication skills
- Ability to work independently as a self-motivated entrepreneur with minimal supervision and as part of a larger team
- Extensive knowledge of competitive offerings, market trends, economic conditions, and the regulatory environment
- A valid driver's license and access to a vehicle, in order to meet clients and prospects within the designated district
- Second language an asset depending on target markets

Other Information

- Please note that the compensation structure for this role is base plus variable pay. This is a mobile role and will require frequent travel. Scotiabank is an equal opportunity employer and welcomes applications from all interested parties. We thank you for your interest, however, only those candidates selected for an interview will be contacted.

#InvestmentSpecialistLocation(s): Canada : British Columbia : Coquitlam

Scotiabank is a leading bank in the Americas. Guided by our purpose: "for every future", we help our customers, their families and their communities achieve success through a broad range of advice, products and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets.

At Scotiabank, we value the unique skills and experiences each individual brings to the Bank, and are committed to creating and maintaining an inclusive and accessible environment for everyone. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let our Recruitment team know. If you require technical assistance, please click [here](#). Candidates must apply directly online to be considered for this role. We thank all applicants for their interest in a career at Scotiabank; however, only those candidates who are selected for an interview will be contacted.

For more information, visit [Scotiabank for Investment Specialist / Financial Planner - Coquitlam, BC](#)