



# 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

Toll Free Fax: (877) 825-7564

L9 P23 R4074 HWY 596 - Box 109

Keewatin, ON P0X 1C0

# Job Board Posting



Careers.Indigenous.Link

Date Printed: 2024/05/03

## Personal Banking Specialist, Investment & Retirement Planning

**Job ID** 149458-en\_US-9193

**Web Address**

[https://careers.indigenous.link/viewjob?jobname=149458-en\\_US-9193](https://careers.indigenous.link/viewjob?jobname=149458-en_US-9193)

**Company** Scotiabank

**Location** Longueuil, QC

**Date Posted** From: 2022-05-17

To: 2050-01-01

**Job** Type: Full-time

Category: Finance

### Description

Requisition ID: 149458

Join a purpose driven winning team, committed to results, in an inclusive and high-performing culture. As an Investment & Personal Banking Specialist, Investment & Retirement Planning you are a member of the branch sales team responsible for contributing to the team's overall success by meeting/exceeding negotiated deposit and investment sales goals through effective management of your assigned portfolio of customers. Your primary role is to establish/deepen investment and primary banking relationships with existing assigned customers as well as customers referred by branch partners.

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

- Be passionate about financial sales as well as delivering trusted financial advice to customers regarding complex investment and retirement planning to customers
- Be results-driven by taking a proactive approach to discovering our customers' needs, listening to understand what they are looking for
- Conduct comprehensive reviews for assigned customers including retirement planning, wealth accumulation and estate planning utilizing financial planning skills to create customized financial strategies and solutions
- Be highly engaged, educating customers, providing relevant insights and expert advice
- Demonstrate a collaborative approach when dealing with peers, customers, and partners
- Build relationships, focusing on providing a great client experience and growing long-standing relationships with existing customers

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

- Successfully completed the CFP Diploma in Financial Planning (or Bank recognized equivalent)
- A minimum three years experience of financial planning and investment sales experience
- Demonstrated sales management experience and the ability to market Scotiabank
- Ability to cultivate strong relationships with customers, peers and partners

What's in it for you

- A competitive compensation and benefits package tailored for the Investment & Personal Banking Specialist, Investment & Retirement Planning role
- Ability to make a lasting impact on an assigned book of customers
- An inclusive culture where we value and recognize our employees' contributions
- An organization committed to making a difference in our communities for you and your customers

Location(s): Canada : Quebec : Longueuil

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 Personal Banking Specialist, Investment & Retirement Planning](#)