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: 2024/03/28

Sales Assistant

Job ID	**35-44-4D-87-45-7E**	
Web Address		
https://careers.indigenous.link/viewjob?jobname=35-44-4D-87-45-7E		
Company	BMO Financial Group	
Location	Vernon, British Columbia	
Date Posted	From: 2022-11-24	To: 2023-01-23
Job	Type: Full-time	Category: Finance
Job Start Date	As soon as possible	
Languages	English	

Description

Supports the branch and team sales and service objectives by providing administrative assistance to deliver an exceptional customer experience. Works collaboratively within the branch and with business partners.
Coordinates marketing activities on behalf of several Investment Advisors.
Expands the business growth potential of the branch and team through telemarketing and outbound calls as required.
Executes sales and service activities which includes review of reports, follow-up on client inquiries, account maintenance.
Accepts and processes orders over the phone or in person.
Proactively and professionally provides assistance to team members in order to meet client needs and team members' expectations.
Analyzes data and information to provide insights and recommendations.
Gathers and formats data into regular and ad-hoc reports, and dashboards.
Prepares and vets client / prospect calls lists; tracks progress as required.
Maintains and organizes client database.
Support sales and service objectives by delivering service to the team's clients (e.g. preparing and maintaining client documentation, administering and maintaining client account files, preparing photocopies, documents, and presentations) to meet or exceed client needs.
Organizes work and information to ensure accuracy and completeness.
Projects a professional and consistent image by adhering to organization's brand, corporate identity, and standards.
Follows through on the risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, act in their best interests, and ensure an effectively run branch.
Protects the Bank's assets and complies with all regulatory, legal, and ethical requirements.
Completes complex & diverse tasks within given rules/limits.
Analyzes issues and determines next steps; escalates as required.

Broader work or accountabilities may be assigned as needed
Qualifications:
Typically between 2 - 3 years of relevant experience and post-secondary degree in related field of study desirable or an equivalent combination of education and experience.
Basic/intermediate knowledge of investment process and procedures.
Strong knowledge of administrative process and procedures as contained in Sales Administration Manual.
Knowledge of proprietary products and services, and fund company offerings.
Knowledge of compliance rules (proprietary and industry).
Good familiarity technology applications and software used in the financial planning and investment industry.
Knowledge of trade processing rules
Successful completion of the Canadian Securities Course & Conduct and Practices Handbook
Current registration as an Investment Representative (IR).
12 hours of ongoing compliance training every 3 year cycle to meet mandatory IDA Continuing Education Program requirements.
Basic specialized knowledge.
Verbal & written communication skills - Good.
Organization skills - Good.
Collaboration & team skills - Good.
Analytical and problem solving skills - Good.

How to Apply

Click "Apply Now"