



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:

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Job Board Posting



Careers.Indigenous.Link

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Investment Specialist - First Nations/Metis/Inuit Candidates

| | | |
|--------------------|---|-------------------|
| Job ID | 3C-BA-63-1E-AD-D5 | |
| Web Address | https://careers.indigenous.link/viewjob?jobname=3C-BA-63-1E-AD-D5 | |
| Company | Bank Of Montreal (BMO) | |
| Location | Toronto, Ontario | |
| Date Posted | From: 2023-03-31 | To: 2023-06-29 |
| Job | Type: Full-time | Category: Finance |
| Languages | English | |

Description

We invite all experienced and aspiring First Nations / Metis / Inuit professionals to apply to roles featured on BMO's Indigenous Careers landing page, as well as all of those on BMO's Careers page. Qualified First Nations / Metis / Inuit applicants applying through these postings will be considered for open job vacancies, where they exist, or added to our Indigenous Talent Network and matched to other upcoming opportunities.

Provides financial and investment planning and advice to deliver a solution in the best interests of the customer. Determines client needs and provides solutions through the sales of managed products and services (e.g. mutual funds, retirement savings plans, and similar products). Provides other solutions indirectly through referrals to business partners.

Takes a lead in proactively engaging with new and existing customers and prospects by providing needs-based assessments to grow loyalty and identify immediate/future opportunities.

Implements business development strategies to acquire new business (outbound calling campaigns and cultivating branch referrals).

Engages customers to grow BMO's business by reaching out, generating appointments, and building new relationships within the community.

Identifies opportunities during customer conversations to generate referrals for personal and commercial banking products (e.g. personal banking, lending, and investments).

Supports the achievement of sales and performance targets.

Provides sales and service support for other members of the team to complete transactions and support the achievement of business results.

Responds to customer investment requests to fulfill investment product needs aligned with the customer's goals and refers the customer to partners where appropriate.

Executes work to deliver timely, accurate, and efficient service.

Learns the role of the Financial Planner and completes the associated accreditation requirements to develop into a Financial Planner role, ideally within a 12-24-month time frame.

Introduces clients to investment strategies and works with clients to set goals and make real financial progress using appropriate guidance tools.

Probes to understand customer personal investment and banking needs and integrates marketing

promotions and programs into customer conversations to provide strategic advice.

Looks for ways to contribute to the ongoing improvement of the overall business results and customer experience delivered.

Maintains current knowledge of personal investment products, practices, and trends and integrates into customer conversations.

May work at multiple branches and through various channels based on market needs to deliver the desired customer experience and achieve overall business objectives.

Builds effective relationships with internal/external stakeholders.

Protects the Bank's assets and complies with all regulatory, legal, and ethical requirements.

Completes complex & diverse tasks within given rules/limits and may include handling escalations from other employees.

Analyzes issues and determines next steps.

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 or an equivalent combination of education and experience.

Good working knowledge of financial industry.

Registration to sell investment products completed - as appropriate for the jurisdiction.

Specialized knowledge.

Verbal & written communication skills - Good.

Organization skills - Good.

Collaboration & team skills - Good.

Analytical and problem solving skills - Good.

We're here to help

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life. It calls on us to create lasting, positive change for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one - for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset. To find out more visit us at <https://jobs.bmo.com/ca/en>.

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.

Note to Recruiters: BMO does not accept unsolicited resumes from any source other than directly from a candidate. Any unsolicited resumes sent to BMO, directly or indirectly, will be considered BMO property. BMO will not pay a fee for any placement resulting from the receipt of an unsolicited resume. A recruiting agency must first have a valid, written and fully executed agency agreement contract for service to submit resumes.

How to Apply

Click "Apply Now"