JOB TITLE: Advisor Relations Representative
DEPARTMENT: Partnerships & Business Development, Worldsource Wealth Management Inc. ("WWM")
REPORTS TO: Director, Partnerships
LOCATION: Markham, ON

Worldsource requires all new hires to be fully vaccinated against COVID-19 at least 14 days before the start date (subject only to any approved accommodation).

JOB STATEMENT:

Reporting to the Director, Partnerships and working in a fast-paced environment, the Advisor Relations Representative will be responsible for delivering unparalleled customer service to both internal and external clients and advisors. This highly motivated, client-centric and energetic candidate will build solid relationships and maximize customer loyalty in an IIROC/MFDA regulatory environment. Additionally, the candidate will take personal responsibility for identifying client needs and providing service excellence while continuously looking for ways to improve quality service delivery.

ESSENTIAL FUNCTIONS:

- Providing professional and accurate service to clients and advisors;
- Probing to understand client and advisor needs based on their unique service and investment requests;
- Receiving and entering non-solicited order execution only trades from advisors for equities, precious metals, options, mutual funds and GICs;
- Acting as a gatekeeper and applying industry rules and regulations during each client and advisor interaction;
- Maintaining current knowledge of investment markets, practices and trends and integrating them into client and advisor conversations;
- Adhering to established service level agreements for email and phone inquiries, and other electronic channels;
- Assisting with the daily phone service queue as required;
- Analyzing, researching and responding to client inquiries in a proactive manner;
- Escalating any complex and unresolved issues to management;
- Ensuring timely follow-up and logging of the issues in the CRM Tracking system; and
- Distributing reports to advisors as required.

QUALIFICATIONS:

- Post-secondary degree or equivalent experience
- Canadian Securities Course (CSC) and Conduct Practices Handbook (CPH) an asset
- 3 – 5 years of similar experience within the investment industry
- Effective written and communication skills
- Willingness and ability to work independently
- Ability to multitask with effective management of projects, timelines and priorities
- Strong customer focus and professional acumen

- Strong problem solving, analytical and conflict resolution skills
- Superior communication, organizational and listening skills
- Familiarity with the Dataphile, Univeris, and/or FCC uniFide and Croesus systems an asset
- Excellent PC skills including Word, PowerPoint, Outlook and Excel
- Full flexibility to work a variety of shifts ranging from 8:00 a.m. - 8:00 p.m. EDT, Monday to Saturday
- Bilingual (French) an asset

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

We thank all applicants for their interest but only those selected for an interview will be contacted.