



JOB TITLE: Corporate Branch Manager (14-month Contract)
DEPARTMENT: Compliance, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Vice President, Dealer Compliance
LOCATION: Markham, ON

JOB STATEMENT:

The Corporate Branch Manager is responsible for providing supervisory functions to various producing field branch managers and advisors. The successful candidate must be highly detailed, organized and accurate and have the ability to work under pressure and meet deadlines. In addition, the candidate must work without supervision, exercise initiative and use independent judgment in the performance of assigned tasks.

ESSENTIAL FUNCTIONS:

- Conducting “Know Your Client” update reviews for suitability and sign-off, specifically for producing Branch Managers that do not have an Authorized Branch Manager;
- Processing Limited Authorization Forms and New Plan Application Approvals;
- Providing trade reviews for the producing Branch Managers and for sub-branches linked to the head office;
- Training of new Branch Managers as required;
- Conducting on-site visits to all producing Branch Managers and registered sub-branches, yearly; and
- Attending all head office meetings as required.

JOB SPECIFICATIONS:

- Post-secondary education
- Successful completion of the Branch Manager’s course
- Successful completion of, or working toward, Exempt Market Dealer course
- Canadian Securities Course completion
- Minimum of 5 years of related work experience
- Ability to be immediately registered with Regulators
- Organized, accurate and detailed
- Excellent working knowledge of Microsoft Word and Excel
- Excellent oral and written communication skills
- Ability to work independently and use independent judgment

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.

