



JOB TITLE: Director, Advisor Relations
DEPARTMENT: Operations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Chief Operating Officer, or Designate
LOCATION: Markham, ON

JOB STATEMENT:

The successful candidate will be responsible for overseeing the Advisor Relations team for both our IIROC and MFDA Dealers. The Director, Advisor Relations is a key individual, responsible for ensuring Worldsource provides the highest level of service to all advisors, their associates and Worldsource partners.

ESSENTIAL FUNCTIONS:

- Managing, motivating, coaching and developing the Advisor Relations department, ensuring all SLA’s are consistently met or exceeded;
- Creating a service first call centre environment, focused on providing superior client experience to our advisors and partners;
- Monitoring all call escalations to ensure satisfactory resolution within an appropriate timeframe;
- Ensuring all Advisor Relations Representatives take ownership of all concerns/questions, seeing the items through to resolution and providing feedback and updates to the advisor throughout the process;
- Participating in the planning and projection of the departmental budget to ensure that departmental and corporate objectives are met;
- Participating in the recruitment process by attending meetings, and pursuing follow-ups to ensure sufficient resourcing and training within the team;
- Working with the Training department to ensure all new Advisor Relations Representatives are appropriately trained and creating training material where appropriate;
- Establishing and maintaining effective relationships with all WWM departments including Training, Administration, Compliance, Finance and Partnerships & Business Development; and
- Developing and implementing SLA’s and call reviews for each team member.

JOB SPECIFICATIONS:

- Post-secondary degree
- Minimum of 10 years’ experience in a call centre environment, with a portion at a leadership level
- Supervisory/Management experience is required
- Understanding of the financial services industry an asset
- Excellent interpersonal, organizational and communication skills
- Ability to handle multiple tasks and competing deadlines

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.

