



**JOB TITLE:** Training Representative & Service Case Specialist  
**DEPARTMENT:** Advisor Relations, Worldsource Wealth Management Inc. (“WWM”)  
**REPORTS TO:** Supervisor, Training and Development and Director, Advisor Relations  
**LOCATION:** 1075 West Georgia Street, Vancouver, BC

**JOB STATEMENT:**

The Training Representative & Service Case Specialist will be working in a fast-paced environment, and will be responsible for delivering unparalleled training and customer service to both internal and external clients on both MFDA/IROC platforms. The candidate will be responsible for analyzing, researching and taking the initiative for resolving issues in a proactive manner. 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:**

- Training the Worldsource Financial Management Inc. and Worldsource Securities Inc. staff in both the branch offices and the head office on the IROC and MFDA platforms and tailoring material to suit;
- Conducting prospect demos for potential new advisors;
- Conducting Dataphile testing, including creating and following test scripts and documenting results;
- Updating Training Guides on the portal;
- Developing and maintaining excellent relationships with advisors through email, conference calls and scheduled office visits;
- Responding to all inquiries from existing advisors and administrators with a focus on building, reinforcing and enhancing the existing business and relationships;
- Researching, resolving and responding to e-mails including providing detailed instructions to the processing team and ensuring timely follow-up and logging of the issue in the CRM Tracking system; and
- Performing other duties as assigned, including providing back up phone and email queue support for the Advisor Relations team.

**QUALIFICATIONS:**

- Post-secondary degree or equivalent experience
- IFIC or CSC an asset
- 5 – 8 years similar experience within the investment industry
- Effective written and communication skills
- Willingness and ability to work independently
- Effective management of projects, timelines and priorities
- Strong customer focus and strong professional acumen
- Strong problem solving, analytical and conflict resolution skills
- Superior communication, organizational and listening skills
- Familiarity with the Dataphile and/or ISM/NBCN an asset
- Excellent PC skills including: Word, PowerPoint, Outlook and Excel

## **COMPENSATION:**

Commensurate with experience

*If you are interested in applying for this position, please forward a cover letter and resume in confidence to [hr@worldsourcevaaltb.com](mailto:hr@worldsourcevaaltb.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 endeavor 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.*