



JOB TITLE: Investment Fund Advisor
DEPARTMENT: Investment Services and Compliance, Worldsource Financial Management Inc. (“WFM”)
REPORTS TO: Sr. Director, Investment Services
LOCATION: Markham, ON

JOB STATEMENT:

The Investment Fund Advisor is a registered trading officer with WFM who has responsibilities to grow and service the House Account and who has indirect responsibilities for WFM’s products and services.

ESSENTIAL FUNCTIONS:

- Developing and growing a client book of business;
- Being responsible for the House Account of clients, providing exceptional service and administration;
- Working with Advisors and their client(s) when an Advisor transitions out of Worldsource;
- Collaborating with all of the Guardian Wealth Management divisions;
- Administering all day-to-day functions, as required; and
- Performing other tasks as assigned by the Sr. Director, Investment Services and/or the Head of Compliance.

QUALIFICATIONS:

- Post-secondary education
- Minimum of 3 years of related experience
- Understanding of mutual fund dealer’s products and services
- Successful completion of CSC or IFIC’s Investment Funds Course and Mutual Fund Branch Manager’s Course
- MFDA and/or IIROC experience
- Ability and willingness to travel within the GTA
- Must be a dynamic and driven individual, motivated to address existing book of business issues/concerns
- Excellent oral and written communication skills
- Strong conflict resolution skills
- Ability to work independently and on a team
- Detail-oriented with excellent organizational skills
- Proficient in Microsoft Office, with an emphasis on PowerPoint and Excel
- Insurance License an asset
- Broadridge/Dataphile knowledge an asset

COMPENSATION:

Salary based, not commission based. 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.

