



JOB TITLE: Advisor Relations Representative
DEPARTMENT: Advisor Relations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Director, Advisor Relations
LOCATION: 5705 Cancross Court, Mississauga

JOB STATEMENT:

Reporting to the Director, Advisor Relations (based out of the Markham office) 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. This highly motivated and energetic candidate will build solid relationships and maximize customer loyalty in an MFDA/IRROC 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 accurate and quality service to clients and advisors;
- Providing support for advisors and assistants by assisting with trade entries;
- Adhering to established service level agreements for e-mail and phone inquiries;
- Assisting with the daily phone service queue as required;
- Analyzing, researching and responding to client inquiries in a proactive manner;
- Escalating any and all 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 Investment Funds Course or Canadian Securities Course an asset
- 3 – 5 years of similar experience within the investment industry
- Effective written and communication skills
- Willingness 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 ISM/NBCN an asset
- Excellent PC skills including Word, PowerPoint, Outlook, and Excel
- Must be available Monday – Friday 9 a.m. – 5 p.m.

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 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.

