



JOB TITLE: Supervisor, Advisor Relations
DEPARTMENT: Advisor Relations, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Director, Advisor Relations
LOCATION: 1075 West Georgia Street, Vancouver, BC

JOB STATEMENT:

Reporting to the Director, Advisor Relations (based out of the Markham, Ontario office) and working in a fast-paced environment, the Supervisor, Advisor Relations 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/IIROC 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:

- Acting as a senior member of the team and being the first point of contact for escalated issues;
- Ensuring reviews are completed on a monthly basis (5 per employee per month) and providing ongoing feedback and coaching;
- Providing back-up phone service as required and monitoring phone and email queues;
- Completing daily service stats reporting;
- 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
- IFIC or CSC an asset
- 5-7 years 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 strong 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

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.