



JOB TITLE: Vice President, Partnerships and Business Development, Eastern Canada
DEPARTMENT: Partnerships and Business Development, Worldsource Financial Management Inc. ("WFM") and Worldsource Securities Inc. ("WSI")
REPORTS TO: President, WFM and WSI
LOCATION: Markham, ON

JOB STATEMENT:

The Vice President, Partnerships and Business Development will be responsible for all aspects of advisor relations with the WFM and WSI advisors in Eastern Canada. The successful candidate will support the department in achieving its annual business objectives, quarterbacking and coordinating advisor recruiting, and supporting the advisor development programs such as practice management and training initiatives through proactive planning, effective information management and advisor contact. The incumbent will act in the best interest of the firm and meet corporate, departmental and advisor business objectives.

ESSENTIAL FUNCTIONS:

Advisor Partnerships –

- Establishing, developing and maintaining contact and relationships with the WFM and WSI advisors, administrators and branch managers in Eastern Canada and/or as otherwise assigned;
- Establishing and maintaining effective relationships with internal staff and management in order to troubleshoot and problem solve on behalf of the WFM and WSI advisors;
- Promoting the Guardian Capital Group Limited ("GCG") capabilities to advisors;
- Providing value-added service to advisors and branches by developing and delivering practice management, sales training, and branch diagnostic and analytical information; and
- Participating in the development and delivery of campaigns, roadshows and conferences.

Recruiting –

- Recruiting advisors by maintaining a network of contacts in the industry and staying abreast of industry trends and transactions;
- Assisting WFM and WSI branch managers with recruiting by coaching and providing guidance around WFM and GCG policies, procedures and financial conditions;
- Managing and maintaining corporate reporting on recruitment AUA, pipeline and transition status; and
- Collecting, analyzing and reporting on the financial aspects of WFM and WSI recruiting.

QUALIFICATIONS:

- Post-secondary education or equivalent experience
- 5-10 years of experience in either the manufacturing or distribution of financial products and services with an emphasis on sales and/or relationship management
- Familiarity with the Dataphile system is an asset
- Strong knowledge of Microsoft Office
- Excellent and effective written and verbal communication skills
- Strong customer focus and professional acumen
- Solid analytical and problem solving skills
- Superior communication, organizational and listening skills
- Experience in presenting is an asset
- Dedicated team player with the ability to take initiative and work independently

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.

