



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

**JOB STATEMENT:**

The Director, Partnerships and Business Development will act as the trusted partner and steward of advisor relations within a segment of the WFM and WSI advisors and partners. As part of the Eastern Canada Partnerships and Business Development team, the successful candidate will act as the relationship manager with advisors and corporate partners, develop advisor and corporate partner recruiting and lead internal initiatives. The successful candidate will also bring a strong awareness of advisor technology and tools. The incumbent will act in the best interest of the firm and meet corporate, departmental and advisor business objectives.

**ESSENTIAL FUNCTIONS:**

*Advisor Partnerships –*

- Establishing, sustaining and growing relationships with a segment of the WFM and WSI advisor and branch network and corporate partners in Eastern Canada and/or as otherwise assigned through the use of a disciplined and consistent approach to partner coverage;
- Establishing and nurturing effective relationships with internal staff and management in order to troubleshoot and problem solve on behalf of the WFM and WSI advisors and partners;
- Supporting the Vice President, Partnerships and Business Development, Eastern Canada in the coverage of key partners and advisors;
- Promoting the Guardian Capital Group Limited (“GCG”) capabilities to advisors;
- Promoting WFM and WSI’s operations and systems tools;
- 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.

*Business Development –*

- Assisting WFM and WSI branch managers with recruiting by coaching and providing guidance around WFM and GCG policies, procedures and financial conditions;
- Guiding and supporting corporate partner recruitment efforts to grow the partnership footprint;
- Developing and maintaining industry contacts while staying abreast of industry trends to drive advisor recruiting efforts; and
- Collecting, analyzing and reporting on the finances of recruiting inclusive of pipeline and transition status.

**QUALIFICATIONS:**

- Post-secondary education
- Familiarity with broker dealer operations and systems (Dataphile) is an asset
- 7+ years of financial services experience in either manufacturing, distribution of financial products and/or supporting the advisor broker dealer network

- Strong customer focus with superior communication, presentation and listening skills
- Strong knowledge of Microsoft Office and advanced analytical skills
- 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](mailto: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.*