



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: Head of Partnerships and Business Development
LOCATION: Markham, ON

JOB STATEMENT:

The Director, Partnerships and Business Development will act as the trusted partner and steward of advisor relations within a defined segment of the WFM and WSI advisor and partner base. 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 lead with a strong understanding of advisor technology and tools, and an awareness of innovation in the wealth management landscape. 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 within 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 advocate, troubleshoot and problem-solve on behalf of the WFM and WSI advisors and partners;
- Supporting the Vice President(s), 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 as required.

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 financial aspects of recruiting, inclusive of pipeline and transition status.

QUALIFICATIONS:

- Post-secondary education

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

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.