

## **Associate, Investment Counsellor**

We're building a relationship-oriented bank for the modern world. We need talented, passionate professionals who are dedicated to doing what's right for our clients.

At CIBC, we embrace your strengths and your ambitions, so you are empowered at work. Our team members have what they need to make a meaningful impact and are truly valued for who they are and what they contribute.

To learn more about CIBC, please visit [CIBC.com](https://www.cibc.com)

### **What You'll Be Doing**

Reporting to the Executive Director and Regional Head, the Associate, Investment Counsellor I (AIC I) provides assistance to the Investment Counsellor in servicing the investment needs of complex, sophisticated high net-worth clients.

*At CIBC we enable the work environment most optimal for you to thrive in your role. Details on your work arrangement (proportion of on-site and remote work) will be discussed at the time of your interview.*

### **How You'll Succeed**

- **Support the IC in the achievement of business development targets resulting in new CPIC clients** - Under the direct supervision of the IC, understand the concepts and processes of the sales cycle and develop the ability to identify the opportunities to develop and win new business for CPIC. You will participate, and gradually take more in responsibility in preparing marketing material for IC review and develop skills and credibility to be able to deliver marketing presentations alone.
- **Establish and maintain effective partnership and teamwork with colleagues** - Build relationships within the CPIC team and other business partners to ensure a level of service delivery that is seamless and timely. You will participate in coaching sessions by the ICs to continue development of investment knowledge, concepts and skills, client relationship management techniques, sales skills and the continued development of understanding the unique service offering of CPIC. Understanding the partnership, you will begin to work with key CIBC partners in Wealth Management including Private Banking Advisors, CIBC Trust and Imperial Service, to grow high net worth client assets, while participating in the high performance sales culture as part of CIBC/CPIC.
- **Ensure adherence to CIBC's compliance procedures and standards** - Ensure day-to-day activities are compliant with policies, procedures, guidelines and legislation/regulations and escalate potential issues to IC and maintain appropriate industry registration status.

- **Continuously update knowledge and skills in order to meet customer needs and interaction preferences** - Keep up-to-date with current events, overall economic and financial environment, trends, products, selling techniques, etc. and in particular those related to area of specialty and analyze market data to identify activities or conditions that may impact business.

## Who You Are

- **You have a degree or diploma** in Business or Economics. Master's degree would be an asset.
- **You can demonstrate experience** in a client servicing role in a financial institution (4-6 years), preferably related to the high net worth clients.
- **You're a certified professional.** You have committed to the Chartered Financial Analyst program and have completed Level 1 and have 12 months of relevant investment management experience, *which is preferred*, OR you received the Canadian Investment Manager designation and have 24 months of relevant investment management experience.
- **You put our clients first** and use your excellent verbal and written communication skills to interact with a variety of clients from the least to the most sophisticated. You have excellent interactive skills sufficient to convey complex conceptual information involving extensive interpretation and opinion
- **Your influence makes a difference.** You know that relationships and networks are essential to success. You inspire outcomes by sharing your expertise. You have strong financial analysis skills along with, an understanding of investments and of markets sufficient to understand the concepts of detailed and complex inquiries from a sophisticated, knowledgeable and high net worth client group.
- **You understand that success is in the details.** You have sales management skills - this may include sales models, principles and techniques sufficient to execute sales strategies effectively selling CPIC tailored solutions.
- **Values matter to you.** You bring your real self to work and you live our values – trust, teamwork and accountability.

## What CIBC Offers

At CIBC, your goals are a priority. We start with your strengths and ambitions as an employee and strive to create opportunities to tap into your potential. We aspire to give you a career, rather than just a paycheck.

- We work to recognize you in meaningful, personalized ways including competitive compensation, banking benefits, a benefits program\*, defined benefit pension plan\*, an employee share purchase plan, a vacation offering, wellbeing support, and MomentMakers, our social, points-based recognition program.

- Our spaces and technological toolkit will make it simple to bring together great minds to create innovative solutions that make a difference for our clients.
- We cultivate a culture where you can express your ambition through initiatives like Purpose Day; a paid day off dedicated for you to use to invest in your growth and development.

\*Subject to plan and program terms and conditions

### **What you need to know**

- CIBC is committed to creating an inclusive environment where all team members and clients feel like they belong. We seek applicants with a wide range of abilities and we provide an accessible candidate experience. If you need accommodation, please contact [Mailbox.careers-carrieres@cibc.com](mailto:Mailbox.careers-carrieres@cibc.com)
- CIBC is committed to clarity in our hiring process. All roles posted are opportunities we're actively recruiting for, unless stated otherwise.
- You need to be legally eligible to work at the location(s) specified above and, where applicable, must have a valid work or study permit.
- We may ask you to complete an attribute-based assessment and other skills test (such as simulation, coding, French proficiency).
- We use artificial intelligence tools during the recruitment process. Our goal for the application process is to get to know more about you, all that you have to offer, and give you the opportunity to learn more about us.

### **Job Location**

MB-Winnipeg, 1 Lombard Place, 10th Floor

### **Employment Type**

Regular

### **Weekly Hours**

37.5

### **Skills**

Business Development, Client Service, Customer Experience (CX), Investment Advising, Portfolio Management, Service Delivery, Wealth Management