

VP Institutional Sales

locations

Toronto Office

Vancouver Office

Calgary Office

Full time

job requisition id: J62733

Job Description

About Us

At Fidelity, we've been helping Canadian investors build better financial futures for over 35 years. We offer individuals and institutions a range of trusted investment portfolios and services - and we're constantly seeking to find new and better ways to help our clients. As a privately owned company, we boldly embrace innovation in all areas as we continue to grow our business into the future.

Working with us means you'll be part of a diverse and dedicated group of people who make a real difference for our clients and communities every day. You'll have a wide range of opportunities to grow and develop your career in an inclusive environment where you'll feel valued and supported to be your best - both personally and professionally.

Business Overview

The Institutional Distribution business provides a comprehensive range of flexible, high-quality solutions for Canadian institutional plan sponsors and their plan members. Through our team of sales, relationship management and consultant relations professionals, Institutional Distribution offers solutions for corporate and public defined benefit and defined contribution pension plans, endowments and foundations that cover major and specialize asset classes.

Your Opportunity

The VP, Institutional Sales is a key driver of new business growth, tasked with aggressively expanding our market share in Western Ontario and Western Canada. This role is centered on proactively identifying, qualifying and closing new sales opportunities. This role is responsible for building a robust pipeline and securing new institutional client relationships for Fidelity. is responsible for building market share by creating, maintaining and executing

account strategies and plans that develop and encourage long term client relationships with existing and new accounts. The incumbent will build and maintain strong client relationships at multiple levels within an account to uncover, qualify and close sales opportunities and build the Fidelity brand. S/he will use their extensive technical knowledge to support business development and keep prospects updated and abreast of Fidelity's competitive advantages.

This role will have a travel requirement as the core clientele is located within Western Ontario and Western Canada regions (i.e. Alberta and British Columbia).

What You Will Do

- Deliver funded new business that meets or exceeds annual sales targets.
- Articulate Fidelity's value proposition to Investment prospects within assigned territory.
- Identify and qualify appropriate sales opportunities within assigned territory
- Cultivate close ongoing relationships with market influencers, consultants and plan sponsors.
- Negotiate legal documents/contracts with new clients, ensuring smooth hand-off to the Transition and Relationship Management teams
- Work collaboratively within and across business units to create one face to the customer and provide leadership and direction to the organization and team members on day to day execution of account plans, events, product needs and service standards
- Partner with various departments within the Institutional business (Client Management, Consultant Relations) and multiple divisions within the greater Fidelity organization (Portfolio Managers, Legal, Compliance, Treasury, Back Office, Products and Marketing, Operations) to ensure all are appropriately engaged in strengthening and advancing business relationships

What We're Looking For

- 8-10+ years experience in the investment management marketplace with a proven track record of developing and maintaining strong relationships at multiple levels across the organization
- University degree preferably in Business, Commerce, Finance or related field or equivalent work experience

- Designations or equivalent technical knowledge and understanding of the investment industry and financial products are an asset, e.g. Canadian Securities Course (CSC), Chartered Financial Analyst (CFA), Masters of Business Administration (MBA)

What You Will Bring

- Understanding of the Canadian financial services industry including:
- In depth knowledge of institutional investments, banking, insurance and the products and services offered
- In depth knowledge of competition and trends in the financial services marketplace
- Solid knowledge of institutional money managers, consultants and the pension industry
- Adept at devising and implementing sales strategies and ensuring that the appropriate information is communicated to the correct audience in a clear and compelling manner
- Able to analyze, classify and allocate appropriate time and resources to plan call cycles, account development and prospecting activities
- Exceptional verbal and written communication skills with the ability communicate to all audiences and on behalf of the Portfolio Manager when required
- Outstanding relationship management skills
- Outstanding attention to detail
- Team player with good negotiation and collaboration skills
- Strong desire for excellence is mandator

Fidelity Benefits and Perks!

- Competitive total compensation package
- Opportunity to participate in Fidelity profit-sharing program
- Company contributes into your RRSP, without a matching requirement from you
- Health benefits and coverage, with no requirement for employee paid premiums, including up to \$5000 for therapy
- Health Care Spending Account

- TELUS Health Virtual Care app
- Health and Fitness Reimbursement
- Up to \$650 for home office equipment
- Generous time off policy
- 2 paid days annually to volunteer
- Access to over 11,000 training and development courses
- Tuition reimbursement
- Monetary awards for completing a required designation
- Annual dues reimbursement for professional designations
- Pregnancy/Parental/Adoption Leave - Fidelity will top-up to 100% of your salary for a period of 25 weeks

Total Rewards That Reflect Your Impact

We believe exceptional work deserves exceptional recognition. That's why we offer a **competitive compensation package** designed to support your success today—and your financial well-being tomorrow.

For this role, your total rewards include:

- **Base Salary:** A competitive annual range of **\$150,000 to \$175,000**, based on your experience and qualifications.
- **Variable compensation plan:** participation in a compensation-based incentive program that rewards you for driving results and achieving targets.
- **RRSP Contribution:** After 6 months of employment, we invest in your future with an **RRSP contribution—no employee matching required.**

We're proud to offer a compensation package that aligns with **provincial pay transparency requirements.**

This posting represents an **existing vacancy** within our organization—an opportunity to step into a role where your talents will make a meaningful difference.

You will be working on a flexible hybrid schedule as part of Fidelity's dynamic working arrangement.

Current work authorization for Canada is required for all openings.

Fidelity Canada is an equal opportunity employer

Fidelity Canada is committed to fostering a diverse and inclusive workplace. We will consider all qualified applicants for employment regardless of race, color, religion, sex, sexual orientation, gender identity or expression, national or ethnic origin, age, disability, family status, protected veterans' status, Aboriginal/Native American status or any other legally-protected ground.

Accommodation during the application process

Fidelity Canada welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in the selection process. If you require an accommodation, please email us at FidelityCanadaStaffing@fidelity.ca.

No telephone inquiries or agencies please. We thank all applicants for their interest, please be advised that only those selected for an interview will be contacted.

Why Work at Fidelity?

We are proud to be recipients of the following:

Awards

- **Canada's Top 100 Employers**
 - o Greater Toronto's Top Employers
 - o Canada's Top Family-Friendly Employers
 - o Canada's Top Employers for Young People

- **Great Place To Work® Certified**
 - o Best Workplaces for Inclusion
 - o Best Workplaces for Mental Wellness
 - o Best Workplaces for Today's Youth
 - o Best Workplaces for Women
 - o Best Workplaces in Financial Services & Insurance
 - o Best Workplaces in Ontario
 - o Best Workplaces with Most Trusted Executive Teams

- **LinkedIn Top Companies in Canada**

- **Human Resource Director (HRD) - Best Place To Work**
 - o HRD - 5-Star Benefit Program
 - o HRD - 5-Star Diversity & Inclusion Employer

Designations

- Canadian Compassionate Companies – Certified
- Benefits Canada's Workplace Benefits Award - Future of Work Strategy
- TalentEgg National Recruitment Excellence Award - Special Award for Diversity & Inclusion in Recruiting
- Canadian HR Reporter's Most Innovative HR Team

To apply for this posting, please click on the link below:

https://fil.wd3.myworkdayjobs.com/en-US/fidelitycanada/job/VP-Institutional-Sales_J62733