Senior Financial Advisor

Opportunities available across the GTA

CIBC is a leading Canadian-based global financial institution. Through our three major businesses – Retail and Business Banking, Wealth Management and Wholesale Banking – we provide a full range of financial products and services to 11 million individual, small business, commercial, corporate and institutional clients in Canada and around the world. We invest in our businesses, our clients, our people and our communities to deliver consistent and sustainable earnings to our shareholders. To learn more about CIBC's Lines of Business, please visit our website.

CIBC focuses on what matters to our employees – access to career and development opportunities, safe and healthy workplaces, effective training, and positive work-life balance – so that employees are able to perform at their best, contribute to their communities and focus on cultivating deeper relationships with our clients.

Every year, CIBC is recognized for its business success, community commitment and employee initiatives. We are proud of this success and are committed to creating an inclusive workplace and an environment where all employees can excel.

To learn more about CIBC and the CIBC Group of Companies please visit CIBC.com.

Job Overview

Imagine being part of CIBC's Imperial Service Financial Advisory team whose focus is offering comprehensive financial advice to a key consumer group with expected growth of more than $500 billion over the next decade. Imperial Service has the largest, most highly accredited in-branch advisory team at any Canadian bank.

Working as an Imperial Service Advisor you will manage and build on an existing portfolio of select CIBC Imperial Service clients. You will choose from a range of investment portfolios designed to match the personal financial goals and investment time horizon while providing a unique needs-based sales approach to assist your clients in achieving their evolving financial goals.

CIBC's world class Imperial Service offering reinforces our goal of building and growing a branch-based financial planning business for mass affluent Canadians. It does this by providing Financial Advisors with the opportunity to increase their total cash compensation based on their performance in providing our clients with trusted financial advice and service. The program provides eligible Financial Advisors with the opportunity to be rewarded based on their performance in growing our revenues, funds managed, net sales, referral to Partners and achieving our business objectives. It provides a clear line of sight between compensation, performance and business results. As performance increases, so does the reward potential. Your keenly honed relationship-building expertise makes you a perfect candidate for a stimulating role with even more stimulating rewards while working for a proven industry leader. If you haven't thought about a career with CIBC, think again.

For what matters.

Job Requirements

- Your role will be to build and strengthen relationships with new and existing clients while meeting clients' short and long term financial needs, recommending a full range of solutions (banking, credit, investment and wealth protection) and taking into account the clients' current situation, risk profile, time horizon, and other personal factors
- Proactively establish, develop and maintain strong client relationships through regular contact and through providing timely, value-added information, advice and recommendations taking into account the latest developments in the markets, the economy, and the investment industry
- Leverage CIBC's financial planning tools to help clients understand what they need to do to reach their goals and to encourage them to act on your recommendations
- Proactively identify opportunities to grow the business

What We're Looking For

- Successful candidates must exhibit CIBC's values of trust, team work, and accountability
- Must have completed the CSC
- Should have the CFP accreditation
- Must meet eligibility requirements for IIROC licensing
- Must have proven success in building solid client relationships
- Must have experience in providing financial planning advise
- Must complete the Conduct and Practices Handbook (CPH) within 3 months of start date
- Must complete the Professional Financial Planning Course (PFPC) or the Wealth Management Essential Course (WME) within 18 months of start date

Please contact Trevy Armstrong at Trevy.Armstrong@cibc.com ***or 416-980-3456 if interested.***