CUSTOMER SERVICE REPRESENTATIVE

CIBC is a leading Canadian-based global financial institution. Through our three major businesses – Retail and Business Banking, Wealth Management and Capital Markets – 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 delivers 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 successes, community commitment and employee initiatives. We are proud of these successes and are committed to creating an inclusive workplace and an environment where all employees can excel.

CIBC is committed to attracting and retaining a diverse team of employees who reflect the communities in which we live and work.

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 our mass affluent client base with expected growth of more than $500 billion over the next decade. Imperial Service is one of the largest, most highly accredited in-branch advisory teams at any Canadian bank.

Working as an Imperial Service Advisor you will manage and grow an existing portfolio of select CIBC Imperial Service clients. To meet your clients' evolving personal goals, risk tolerance and investment time horizon you will have access to a range of investment solutions designed to provide a unique needs-based sales approach. Through our development program you will enhance your financial planning expertise, product knowledge and sales acumen to assist your clients in meeting their financial goals.

Your keenly honed relationship-building skills make you a perfect candidate for a stimulating and rewarding role working for a proven industry leader. If you haven't thought about a career with CIBC, think again.

What You'll Be Doing

- Proactively establish, develop and maintain strong client relationships through regular contact and by providing timely, value-added information, advice and recommendations
- Engage with several new and existing clients every day to understand their long term financial goals and objectives and their short term financial needs, present customized financial recommendations, offer advice and complete sales.
- Build client loyalty by providing an exceptional client experience through delivering trusted advice resulting in consolidation of assets and earn referrals from your clients and friends
- Monitor your overall portfolio, reviewing progress against planned activities and targets and maintain overall responsibility for portfolio management including credit management
- Network regularly with existing clients and referrals in order to build relationships and gain referral business
- You will be your clients' main point of contact and are accountable for responding to their questions and concerns and ensuring they are aware of all the ways to do their day to day banking
- Be part of a broader team that includes our branches and our partners all working together to build client loyalty through a one team approach

What We're Looking For

- Your values align to ours – trust, team work, and accountability
- Passion for client service. You enjoy talking with clients, are interested in getting to know them and helping them achieve their goals
- Well-developed interpersonal and communication skills including the ability to quickly engage and connect, actively listen, empathize, ask questions and respond in language that clients understand
- Well-developed relationship building and presentation skills sufficient to convey detailed information requiring interpretation to highly knowledgeable clients, professionals and business groups within the community
- Developed knowledge of investment/deposit products/services, credit products/services, consumer lending practices, credit analysis and industry compliance standards
- Minimum two to five years of experience in providing financial planning advice
- Successful completion of the Canadian Securities Course (CSC) to support IIROC licensing. Must complete the Conduct and Practices Handbook Course (CPH) within 3 months of start date. Must complete the Wealth Management Essentials Course (WME) within 30 months of start date If you have been MFDA registered for the past 3 years and your Canadian Securities Course was completed more than 3 years prior to submission of the IIROC registration application you will be required to complete the WME within 3 months of your start date to validate your CSC for registration
- Asset to have the Certified Financial Planner designation or willing to complete.

What CIBC Can Offer You

- Flexible health benefits, stock purchase plan, competitive incentive pay and recognition programs
- Competitive salary and banking benefits

- Career growth, development and continuous learning opportunities
- Opportunity to be involved in CIBC events that help our communities
- Click to learn more about Rewards & Recognition, Learning & Development, and Employee Community Involvement

What You Need To Know

- Must be legally eligible to work in Canada at the location(s) specified above and, where applicable, must have a valid work permit or study permit that allows the candidate to fulfill the requirements of the role
- This is a regular fulltime role with a schedule of 37.5 hours per week
- This role requires an individual capable of working flexible hours to accommodate client needs including days, evenings and weekends
- Branch environment. Occasional travel or visits to clients off-site as required
- This role requires successful completed the Canadian Securities Course (CSC)/Canadian Investments Funds Course (CIFC) and must meet eligibility requirements for IIROC licensing