



FINANCIAL SERVICES REPRESENTATIVE

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 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.

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

Job Overview

Imagine working in a fast-paced branch environment where you play a key role in helping your clients achieve their financial goals. At CIBC, you will enjoy an exciting career that is both personally and professionally rewarding and will offer you great opportunities for career advancement based on your performance. Every day, you'll have the opportunity to provide an exceptional client experience by going above and beyond to strengthen and build client loyalty. You will work in an environment where your work is meaningful and you will feel proud of how you have helped clients achieve what matters to them.

The Financial Services Representative has individual performance targets and is expected to meet their goals on a weekly, monthly, quarterly and annual basis by following a disciplined approach to completing sales activities.

You will receive extensive sales and credit training related to CIBC products and services, on established guidelines and procedures, systems and proprietary tools to help you meet client needs and ensure the highest quality of service and advice is delivered.

What You'll Be Doing

- Engage with several clients every day to meet their immediate and future needs, offer advice, handle objections and complete sales for both personal and small business clients
- Proactively contact clients by phone to identify potential client needs, and schedule appointments to further discuss clients' opportunities

- Seek to understand and advise clients based on a comprehensive financial planning approach including cash management, credit, investment and wealth protection
- Demonstrate the benefits and assist clients in using all channels such as Bank Machines, Telephone Banking, Mobile and Online Banking
- Resolve client problems quickly and/or refer to colleagues, as appropriate
- Work as part of a team to ensure the client is receiving the most appropriate advice and introduce them to the appropriate colleague to meet their needs
- Keep current on CIBC products and systems to close any gaps in knowledge
- Introduce clients to CIBC's best-in-class online and mobile banking technology (e.g. Tablet, ATM, Online and Mobile "apps")
- Participate in marketing and business development activities such as client acknowledgement programs and client appreciation activities

What We're Looking For

- Your values align to ours – trust, teamwork 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 communications skills including the ability to actively listen, empathize, ask questions and respond in language that clients understand
- Ability to engage and quickly connect with clients making the client feel their business is valued
- You are organized and can set priorities to achieve performance targets
- Proven experience and engagement with the latest digital technology and mobile "apps"
- You take accountability for solving client problems by identifying solutions and options that work for the client
- Committed to personal development and have current accreditation and good standing in Mutual Funds License (Canadian Securities Course or Investment Funds In Canada)
- 2 – 3 years of experience promoting products to meet client needs required. Prior experience promoting financial services products including credit cards, accounts, mortgages and credit lines is a definite asset

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 requires an individual capable of working flexible hours based on the branch operations including days, evenings and weekends
- Occasional travel may be required within assigned region
- This role requires a Mutual Funds License in good standing (Canadian Securities Course or Investment Funds In Canada)