

Branch Manager, Wealth Management – Kelowna Job #3102

Summary

Canaccord Genuity, Canada's leading independent investment dealer is seeking a motivated leader with excellent communication skills to join their Wealth Management group as a Branch Manager.

The successful candidate for this challenging position will be responsible for meeting the firm's objectives in a leadership capacity through managing a profitable and efficient branch, safeguarding client assets and looking after their needs.

Responsibilities

- Revenue Enhancement: recruit and select competitive candidates, promote new products and issues, set realistic branch targets and liaise with IAs to ensure they are meeting targets;
- Expense Control: adhere to national targets for allowable growth of operating expenses, perform audits as needed, follow up on errors and perform monthly analysis reports or branch performance;
- Asset Growth: educate IAs on importance of building long-term client relationships; educate and motivate IAs on growing assets and trying to control as much of a clients net worth as possible under management;
- Compliance: adhere to corporate and regulatory compliance requirements necessary to meet standards, safeguard assets of shareholders, monitor and control branch performance and take responsibility for the quality of business within the branch, keep up to date with industry trends and developments;
- Customer Service: ensure ethical and professional behavior of all branch employees and resolve any client complaints in an efficient and professional manner;

Skills and Qualifications

- Extensive industry knowledge, including knowledge of individual securities, how the capital markets work, economic cycles and the performance of securities within these cycles, taxation issues, etc;
- Strong communication and presentation skills;
- Ability to make quick and ethical decisions;
- Strong influencing skills;
- Ability to work under pressure and strict deadlines;
- Strong analytical skills;
- Business undergraduate degree;
- Solid quantitative skills including strong financial modeling skills;
- Resourceful, diligent and strong attention to detail;
- Ability to work independently and manage time and multiple tasks;

- Previous related financial industry experience an asset;
- Canadian Securities Course.

Qualified applicants are invited to submit a resume and cover letter including salary expectations. All applications will be held in strict confidence.

Please e-mail your application to Human Resources at careers@canaccord.com quoting the job title and job # 3102 in the subject line. We ask that all resumes are sent in a MS Word attachment and salary expectations are noted. In order to be considered for employment at Canaccord Genuity, candidates selected for interviews will be required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. No telephone calls or recruitment agencies will be accepted. Thank you for your understanding.