

Wealth Strategist

We're on a mission to build the relationship-focused bank of the future and we're looking for the passionate collaborators, innovators, advisors, and leaders who can get us there. Our distinct culture is built on a shared commitment to do what's right for our clients, our people, and our communities, and we strive for excellence in everything we do. Because life at CIBC is not only what you do, but how you do it.

To learn more about CIBC, please visit [CIBC.com](https://www.cibc.com)

What You'll Be Doing

As a Wealth Strategist you will work closely with CIBC Private Banking Advisors, CIBC Wood Gundy Investment Advisors and CIBC Private Investment Counselors and their clients to establish a roadmap for their future financial success. You will review High Net Worth (**HNW**) and Ultra High Net Worth (**UHNW**) clients' financial circumstances and goals and develops the appropriate strategies and solutions to meet their long term and short term needs. Your territory will cover offices in Calgary and surrounding area.

How You'll Succeed

- **Client First** - Prepare and present comprehensive financial plans that meet existing and prospective client's needs and objectives for HNW clients (minimum \$5 million in investible assets) by leveraging internal CIBC expertise. Work with the client's other external advisors as appropriate (i.e. lawyers and accountants) in gathering and validating information to support development of plans and recommendations.
- **Collaboration** - Work proactively with Investment Advisors, Private Banking Advisors and Private Investment Counselors to lead the development of an integrated financial plan for new and existing HNW clients. Assemble a multi-disciplined team to develop innovative domestic and global solutions for the client's personal and business needs (banking, investing, estate and trust planning, tax minimization, education, business valuation, sale of a business, charitable giving etc.)
- **Relationship Building** – Make an impact in your community, and show clients they're appreciated by engaging in marketing and outreach activities. Play an active role in the acquisition and retention of HNW clients through proactive networking. Build and sustain a network of experts (lawyers, accountants, tax experts, etc) who can be leveraged to support the development of complex financial plans and identify potential referral sources for clients.

Who You Are

- **You're an expert financial planner.** You can demonstrate superior financial planning skills and proven success in developing comprehensive financial plans for HNW and UHNW clients.
- **You put our clients first.** You engage with purpose to find the right solutions. You go the extra mile, because it's the right thing to do. You have extensive experience (10+ years) working with High Net Worth clients.
- **You're a certified professional.** You have successfully completed the Certified Financial Planning (CFP) designation. Other designations such as TEP, CPA, CA, CMA, LLB, are considered an asset.
- **Values matter to you.** You bring your real self to work and you live our values – trust, teamwork and accountability.

What CIBC Offers

At CIBC, our people are our greatest asset. You'll become part of a diverse community that acknowledges everyone's unique talents, and empowers teams to do what's right for the client, and to do it well. As part of our team, you will:

- **Thrive:** Benefit from an open and approachable culture that provides the flexibility and support you need to integrate your life at work and at home.
- **Connect:** Work in a place where the right technology and infrastructure fosters innovation, collaboration and creativity.
- **Develop:** Grow your skills and career through our best-in-class onboarding experience, ongoing learning opportunities, individual development planning, and comprehensive product training.
- **Prosper:** Share in our collective success with a competitive salary, incentive pay, banking benefits, health benefits program, and employee share purchase plan.

What You Need to Know

- CIBC is committed to creating an inclusive environment where all team members and clients feel like they belong. We seek applicants with a wide range of abilities and we provide an accessible candidate experience. If you need accommodation during the application or interview process, please contact Mailbox.careers-carrieres@cibc.com

- You need to be legally eligible to work in Canada at the location(s) specified above and, where applicable, must have a valid work or study permit.
- This is a regular full time role with a schedule of 37.5 hours each week, you may be required occasionally work outside of business hours.
- Due to the nature of the role, there will be travel required within your designated region.
- **To apply, please send your resume to Stefania.Bilotta@cibc.com and specify the location in the subject line of the email**