

National Bank

Lead Expert Wealth Management Solutions

Reference: 21542

Area of Interest: Wealth management

Status: Permanent, Full-Time

Number of Positions: 2

Location: Toronto, Calgary or Vancouver

Attendance : Hybrid

Please note that candidates can be located in either Toronto, Calgary or Vancouver

Join the dynamic team of planners supporting full-service brokerage at National Bank Financial Wealth Management (NBFWM). National Bank of Canada, the 6th largest in Canada, is expanding rapidly and is looking to increase its team of high-caliber planning professionals. As a Lead Expert, you will be reporting directly to the Assistant Vice-President Advice, Wealth Management Solutions, you will provide leadership for the delivery of the financial and estate planning service offering to our wealth management advisors in the province and their clients.

Your job:

Lead a multidisciplinary team (made up of financial planning advisors, estate planning advisors and analysts) which provides support and assistance in the region for the following offers and services:

- Financial planning service offering
- Offer of estate planning services
- Tax support
- Integration of various partners and related services (insurance, banking solutions, fiduciary services (Trust), business services, etc.).
- Prioritize, hire and fill positions in the multidisciplinary team
- Promote the National Bank brand to organizations and planners in a recruitment strategy and monitoring of best practices (e.g. FP Canada)
- Maximize the contribution of team members by establishing performance objectives linked to the business plan and promoting the commitment of all stakeholders.
- Create a mobilizing climate in order to achieve the business objectives of the sector through team collaboration and to ensure the support of the various stakeholders for these orientations.
- Ensure alignment of strategies with leaders of different sectors nationally.
- Ensure regular communication with the national and regional management of National Bank Financial-Wealth Management (NBFWM) to guarantee maximum dissemination of our various service offerings and optimal alignment in execution.
- Ensure the development, implementation and updating aimed at optimizing the efficiency, productivity and profitability of expert services.
- Be responsible for the quality of the services offered and develop strategies to ensure the satisfaction of advisors and clients.
- Participate in client meetings and support the team in files
- Review of the offer and support the AVP in building the team and the long-term vision

More specifically, you will have to:

- Carry out the effective implementation of wealth management offering, programs and services in the practice of advisors
- Foster an environment that favors the conclusion of business development opportunities (asset consolidation, insurance, credit, etc.)
- Ensure planning, management and monitoring of budgets, and see to the optimal allocation of financial resources
- Participate in various committees and presentations that require a high level of expertise and ensure visibility of the sector

Your team:

You will be responsible for a team of about fifteen employees whose role is to support and guide the wealth management advisors of the NBFWM network in providing wealth management advisory services. You will be responsible for the financial planning, estate planning and tax teams outside of Quebec. You must ensure that the teams' delivery is well aligned with our relational and entrepreneurial model while ensuring that the planning experience reflects the needs of the customers at NBFWM. Finally, you will ensure that the customer experience is enhanced and that there is synergy with the various partners and services related to the NBFWM and the bank.

Prerequisites:

- Holding a TEP title/accreditation or in financial planning (FP Canada., CFP) or/and master's degree in finance or actuarial science or/and master's degree or Diploma of Studies superior and specialized in taxation
- University degree in a relevant field (law, accounting, actuarial science, finance, economics, etc.).
- Minimum of 10 years of professional experience in the field of financial and estate planning or in wealth transfer
- Taxation a strong asset
- Excellent knowledge of the wealth management industry
- Excellent understanding of the reality of wealth management advisors
- Experience in team management
- Ability to develop multidisciplinary teams and ensure their commitment to achieving common objectives
- Experience in wealth or business transfer an asset
- Be recognized as a leader in the industry
- Strong influencing skills
- Excellent communication skills
- Bilingualism (spoken/written French) an asset

Your benefits

In addition to competitive compensation, upon hiring you'll be eligible for a wide range of flexible benefits to help promote your wellbeing and that of your family.

- Health and wellness program, including many options
- Flexible group insurance
- Generous pension plan
- Employee Share Ownership Plan
- Employee and Family Assistance Program
- Preferential banking services
- Opportunities to get involved in community initiatives
- Telemedicine service
- Virtual sleep clinic

These are a few of the benefits available to you. We have an offer that keeps up with trends as well as your needs and those of your family.

Our dynamic work environments and cutting-edge collaboration tools foster a positive employee experience. We actively listen to employees' ideas. Whether through our surveys or programs, regular feedback and ongoing communication is encouraged.

We're putting people first

We're a bank on a human scale that stands out for its courage, entrepreneurial culture, and passion for people. Our mission is to have a positive impact on peoples' lives. Our core values of partnership, agility, and empowerment inspire us, and inclusivity is central to our commitments. We offer a barrier-free workplace that is accessible to all employees.

We want our recruitment process to be fully accessible. If you require accommodation, feel free to let us know during your first conversations with us. We welcome all candidates! What can you bring to our team?

Come live your ambitions with us!

Please apply online at: <https://rita.cegid.cloud/go/66f6c1b5f718485a9b58709d/55fc1d9212497d6147902cd7/en>