

## **Director, 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.

Wealth Strategies Group brings together financial planning service support, specialized advisory services such as Tax and Estate Planning, Business Transition and Wealth Strategist along with Financial Planning Consultants. These groups create a center of excellence to enhance delivery of our integrated Wealth Management offer.

CIBC Wealth Strategist Team delivers financial planning and specialized advisory solutions to meet the unique needs of Canada's high net worth individuals, families, private holding companies, trusts, estates, charitable foundations and First Nations. Wealth strategies include estate planning, business transition planning, tax minimization strategies, protection planning and philanthropy.

Wealth Strategists work closely with Relationship Managers across CIBC lines of Business but in particular in with High net worth clients in areas such as CIBC Wood Gundy, CIBC Asset Management, CIBC Private Wealth Management and CIBC Investor's Edge.

### **What You'll Be Doing**

Reporting to the Senior Director, Financial Planning & Advice for Quebec and Atlantic, the role is accountable for acting as the senior wealth advisor and subject matter expert on complex Financial Planning, Trust and Estate concepts, providing advice and recommended strategies to high profile and ultra high net-worth clients and prospects. In addition to the advisory, sales and client-facing accountabilities, the incumbent will act as an ambassador for all Wealth Management to internal partners and clients. Being the external face of CIBC at local client and industry events. They are responsible for leading and advocating the wealth integrated offer in their markets and as such, provide informal leader and mentorship to other planners in the market.

### **How You'll Succeed**

In addition to providing Financial Planning to their own referral sources, the incumbent is also accountable for undertaking and fulfilling the following role accountabilities:

- Provide complex planning and advice strategies to ultra high net worth clients focusing on financial planning suitability recommendations
- Promote our brand, focus on holistic advice and initiatives through CIBC Work Place, internal and external videos, public speaking and client events
- In providing advice to clients, work closely with the Tax and Estate Planning Team to structure complex plans effectively
- Work closely with Wealth and Retail Distribution senior leadership team to promote and support business development and local initiatives.
- Focus on Family Enterprise planning initiatives including a priority on Business Succession Planning and Philanthropic strategies for ultra high net worth clients.

- Increase the acquisition, loyalty and consolidation of existing ultra-high net worth clients across CIBC; and increase the depth and breath of planning through the wealth management integrated offer.

#### **Who You Are**

- 10 - 15 years of experience in the financial services industry with a minimum of 10 years' experience in building and maintaining relationships with high net worth clients
- Financial Planners Designation (Pl. Fin with IQFP for Quebec) (CFP with FP Canada all provinces excluding Quebec)
- CPA, CA, CMA, LLB or other relevant designations would be an asset
- Strong knowledge in the following area: tax, investment management, financial planning, law, trust, credit, commercial banking, international private banking, and private banking.
- Excellent influential/interviewing/communication/relationship management skills with proven ability to build strong lifetime client relationships, identify and realize appropriate partnership and consolidation of opportunities.
- Demonstrated ability in analyzing sales and service results/trends and responding quickly and effectively to opportunities presented.
- Strong confidence, customer service orientation and effective when interacting with wealthy clients and their advisors.
- Strong organization and time management skills to effectively manage priorities and meet business/client requirements within tight deadlines/constraints.

#### **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 [Christina.Mansour-Ariganello@cibc.com](mailto:Christina.Mansour-Ariganello@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 have to work flexible hours to meet client and team requirements.
- Moderate travel will be required to meet with clients and partners and to attend industry/community events.