



JOB TITLE: Vice President, Partnerships and Business Development, Western Canada
DEPARTMENT: Partnerships and Business Development, Worldsource Financial Management Inc. (“WFM”) and Worldsource Securities Inc. (“WSI”)
REPORTS TO: Head of Partnerships and Business Development
LOCATION: Vancouver, BC

JOB STATEMENT:

Amidst our continued growth at Worldsource, we are looking for a Vice President, Partnerships and Business Development (VP, PBD) who will be responsible for all aspects of partner relations with WFM and WSI advisors in Western Canada. The successful candidate will help drive forward the department’s annual business objectives, coordinate and propel partner recruitment efforts, and lead strategic initiatives. The VP, PBD will accelerate the region’s growth through heightened engagement, advocacy and servicing efforts, and will leverage proactive planning and activity, effective information management and dedicated advisor interactions to achieve results. The incumbent will act in the best interests of the firm in meeting all corporate, departmental and advisor business objectives.

ESSENTIAL FUNCTIONS:

Partnerships –

- Establish, develop and maintain contact and relationships with WFM and WSI advisors, administrators and branch managers in Western Canada and/or as otherwise assigned;
- Establish and maintain effective relationships with internal staff and management in order to support, troubleshoot and problem solve on behalf of WFM and WSI advisors;
- Support partner enhancement and optimization programs such as succession planning, segmentation and practice management initiatives;
- Provide value-added service to advisors and branches by assessing business efficiency practices, identifying growth and operational enhancement opportunities, developing and delivering practice management, branch diagnostic and analytical information;
- Actively participate in the development and delivery of campaigns, roadshows, conferences and advisory councils; and
- Promote Guardian Capital Group Limited’s (“GCG”) channel capabilities and innovation to advisors.

Business Development –

- Recruit advisors and corporate partners by maintaining a network of contacts in the industry and staying abreast of industry trends, transactions and the competitive landscape;
- Assist WFM and WSI advisor groups and branch managers with recruiting through coaching and guidance on WFM and GCG value propositions, policies, procedures and financial conditions;
- Manage and maintain corporate reporting on recruitment AUA, pipeline and transition status; and
- Collect, analyze and report on the financial aspects of WFM and WSI recruitment initiatives; book assessment processes and transition incentive methodologies.

QUALIFICATIONS:

- Post-secondary education or equivalent experience; professional accreditation is an asset
- 5-10 years of experience in either the manufacturing or distribution of financial products and services, with a strong emphasis on sales and relationship management
- Extraordinary consumer focus and professional acumen

- Public speaking capabilities and experience is a valued competency
- Strong leadership capabilities with a passion for people and entrepreneurship
- Familiarity with the Dataphile system is an asset
- Strong knowledge of Microsoft Office
- Exceptional written and verbal communication skills
- Superior communication, organizational and listening skills
- Solid analytical and problem solving skills
- Dedicated, enthusiastic team player with the ability to take initiative and work independently

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

We thank all applicants for their interest but only those selected for an interview will be contacted.