



Financial Services Representative

Be at the heart of industry-leading client relationships

At CIBC, we're building a relationship-oriented bank for the modern world. For over 150 years, we've helped make our clients' ambitions a reality. We've helped them own their homes, build their businesses and secure their financial future. We need talented, passionate professionals who are dedicated to doing what's right for our clients. Help us keep the tradition alive.

Our Financial Services Representatives (FSRs) support personal banking and business clients. Working together with a committed team in a dynamic banking centre environment, you'll cultivate a deep understanding of your clients' needs as you recommend simple, personalized solutions that will help them achieve their financial goals.

It's about more than just borrowing or investing. It's about developing a plan for each client's most important life events. It's about building relationships on trust, teamwork and accountability.

Professional experience

A successful Financial Services Representative is someone who:

Attributes

- Is caring
- Has the ability to use positive change
- Is goal oriented
- Actively listens and is a good communicator
- Is focused and detail oriented
- Is self-motivated to achieve goals and mandates

Client complexity

- Proactively builds deep and lasting client relationships
- Welcomes walk-in clients in a banking centre
- Understands day-to-day banking products
- Has foundational knowledge of business banking needs
- Can manage the needs of personal and business clients

Accreditation

- Has completed the Canadian Securities Course (CSC) or Investment Funds in Canada (IFIC). Certificate of Financial Services Advice (CFSA)/RRC (Quebec) is an asset.
- Meets requirements for Canadian Investment Regulatory Organization (CIRO) or Autorité des marchés financiers (AMF) licensing.

Knowledge and experience

- Has 1 year of experience working with clients and achieving sales results
- Is passionate about providing advice to meet clients' needs
- Is comfortable proactively engaging clients and uncovering opportunities
- Asks the right questions to understand a client's needs and identifies the right solutions
- Can stay connected with multiple clients in a fast-paced environment
- Uses technology to meet clients' needs and adapts to updates
- Understands compliance processes and how to mitigate risk

Achieve your career ambitions



[Learn more about how we're helping clients plan for the most important things in life](#)