

# Associate Investment Advisor Position

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CIBC Wood Gundy is the retail division of CIBC World Markets Inc., the corporate and investment banking arm of the Canadian Imperial Bank of Commerce (CIBC). One of the largest banks in Canada, CIBC is a full-service global financial institution.

Within the Kerrisdale branch of CIBC Wood Gundy, a well-established financial advisory group requires an Associate Investment Advisor. The position responsibilities and qualifications are as follows:

## Responsibilities

- taking investment orders
- preparation of Investment Policy Statements
- preparation of detailed investment portfolio proposals
- analyzing company data
- developing and maintaining financial and performance models
- preparation of written portfolio reviews and presenting review results to clients
- marketing and sales – prospecting and asset gathering

## Qualifications

- University graduate in commerce, accounting or mathematics
- CFA designation
- Licensed for securities, options and derivatives (insurance would be a bonus)
- Minimum of two years of work experience in a brokerage or portfolio management firm
- Excellent written and verbal communication skills
- Ability to perform under pressure and meet time sensitive deadlines
- Acute attention to detail and commitment to task
- Good understanding of the financial/stock market also an asset
- Ability to prioritize work and multi-task responsibilities
- Strong PC skills – especially in Microsoft Office applications (Word, Excel, Access, Outlook), client contact management systems (Maximizer or Act) and sourcing data from the internet and various sector publications
- Self starter - must be well organized and able to work independently
- Superior customer service focus
- Good interpersonal skills
- High level of integrity and professionalism
- Ability to fit into a team-oriented environment
- Flexibility to work long hours when necessary to meet time-sensitive deadlines
- Outgoing personality

Salary plus bonus will be based on qualifications.

If you are interested in this opportunity, please forward or email your resume to the attention of:

Steve Nyvik  
CIBC Wood Gundy  
Kerrisdale Station  
Suite 401 – 2052 West 41<sup>st</sup> Avenue  
Vancouver, B.C.  
V6M 1Y8

Email: [steve.nyvik@cibc.ca](mailto:steve.nyvik@cibc.ca)