

Investment Counsellor, BMO Harris Private Banking Victoria, BC

Investment Counsellor is accountable for delivering a superior client experience, meeting or exceeding business plan by increasing number of new clients, retaining existing clients, referring to partners and growing overall Investment Management line of business revenue. Responsible for executing investment programs to achieve objectives of clients. Prospects new and profitable business within their assigned marketplace or their current customer base. Acts as the Relationship Manager to assigned clients and effectively interacts with others assigned to the client/relationship team. Meets all of client's financial needs by engaging expertise within BMO Harris Private Banking (including. Investment management, banking services, philanthropy, business succession, financial planning, and trust administration)

The ideal candidate will possess strong interpersonal and business development skills, along with strong technical (investment) skills required to successfully manage high net worth clients. The qualified candidate must also have a minimum of 2 years of investment industry experience and have or be eligible for BCSC ICPM registration"

Preferred academic requirements include an undergraduate degree and completion of CFA.

BMO Harris Private Banking thanks all applicants. We advise that only those who qualify for an interview will be contacted. At BMO Harris Private Banking, we are committed to diversity and equitable opportunity for all individuals.

If you are interested in applying for this position please visit www.bmo.com/careers and apply to job ID 55082. When you apply please upload a resume and cover letter in Word format.

No Agencies Please.