Financial Consultant (Bank Wealth Management Program) Located at 1st National Bank of Scotia

The Wealth Management Specialist partners with clients to identify their financial goals, analyze their financial plan and develop recommendations that will help them work towards well defined financial objectives. This job builds strong relationships and trust with clients, which allows the Wealth Management Specialist to provide strategic investment advice for clients as well as recommend value-added products and services.

Key Responsibilities And Duties

- Fosters and maintains a solid relationship with bankers to help them to understand how we can help their customers reach their financial goals through education and open communication.
- Develops and implements strategic and tactical plans with strong consideration to client challenges.
- Tailors investment strategies for clients, identifying objectives and constraints including regulatory issues, liquidity needs and tax implications to devise customized financial plans.
- Reviews client information, including financial statements, risk investment profile and cash availability.
- Builds and solidifies client relationships pre- and post-retirement with the goal of developing first call status for all financial planning needs.
- Grows book of business through identifying value-added products and services for clients and develops additional business through referrals.
- Performs investment research and stays informed of developments in security markets and related products, in order to provide clients with up-to-date financial guidance.
- Confers with tax attorneys, accountants, etc. to determine legal consequences of investment decisions and resolve account problems.

Qualifications

- 5 - 7 Years Preferred
- University (Degree), Preferred or equivalent experience

FINRA Registrations

- Series 7; Series 63; Series 65; Series 66

Physical Requirements

- Physical Requirements: Sedentary Work

Preferred Education

- University (Degree) or equivalent experience

Preferred Licenses And Certifications

- Life and Health Insurance License (Resident State) - Multiple Issuers required

Career Level

"Certified Financial Planning" designation is preferred

Company Overview

Along with OSAIC INSTITUTIONS, INC. a full-service financial firm. FIRST SCOTIA WEALTH MANAGEMENT is committed to helping our clients pursue their financial goals. We offer a wide range of financial products and services to individuals and business owners. We believe our clients will be better able to identify their goals and make prudent decisions to help reach them by providing sound financial information.

Benefits And Total Rewards

The organization is committed to making financial well-being possible for its clients, and is equally committed to the well-being of our associates.

Equal Opportunity

We are an Equal Opportunity/Affirmative Action Employer. We consider all qualified applicants for employment regardless of age, race, color, national origin, sex, religion, veteran status, disability, sexual orientation, gender identity, or any other protected status.