

# Job description

The Saskatoon Branch at Desjardins Financial Security Investments Inc. (DFSI) has a great opportunity for an experienced Financial Advisor to manage and take over an existing in-house book of business.

The ideal candidate will deliver personalized financial solutions to a book of current DFSI clients. They should be comfortable working with clients, creating financial plans, building investment plans and recognizing/implementing opportunities for insurance. Along with working with our DFSI clients, your business will grow through various ways: prospecting, networking activities, uncovering opportunities within our client base, and our current DFSI growth initiatives.

As an employee of DFSI you will work out of our Saskatoon office. Your compensation will entail a base salary, quarterly bonus, benefits plan, pension, and access to ongoing training and education. As part of our team, you will have administration support, a full suite of technology, an office, training and mentorship, and all of your costs are covered by DFSI.

## **Responsibilities**

- Provide investment, insurance & financial planning support to an existing book of clients
- Cultivate client relationships while providing excellent customer service
- Participate in the exciting growth opportunities Desjardins is creating
- Stay current on both investment and insurance industries
- Work within a team to best serve our clients

## **Qualifications**

- 5+ years' of Financial Advisor experience
- Strong understanding of the investment & insurance business
- Licensed to sell Mutual Funds and Life Insurance
- Excellent interpersonal and sales skills with a belief of putting clients first
- Bachelor's degree in Finance or related field is an asset
- Designations such as CFP will be considered an asset

Term: Full- time

Location: 330 – 20<sup>th</sup> Street East, Saskatoon , SK S7K 0A7

Submit Resume to: Greg Munro [greg.munro@investdfsi.ca](mailto:greg.munro@investdfsi.ca)

We thank you for your interest. Only candidates selected for an interview will be contacted.