

Contact Centre Investment Team - Mutual Funds Representative

We're building a relationship-oriented bank for the modern world. We need talented, passionate professionals who are dedicated to doing what's right for our clients.

At CIBC, we embrace your strengths and your ambitions so you feel empowered at work. Our team members have what they need to make a meaningful impact and feel truly valued for who they are and what they contribute.

To learn more about CIBC, please visit [CIBC.com](https://www.cibc.com)

Job Description

What You'll Be Doing

You'll join the Contact Centre Investment Team. As a Mutual Funds Representative you will focus on providing an excellent client experience, by recognizing opportunities to promote CIBC investment products and services that help clients achieve their financial goals. You will be responding to client inquiries related to mutual fund and fixed term investments and provide detailed and in-depth information on products and services.

We want to hear from you if:

- You go the extra mile, because it's the right thing to do.
- You are ambitious and you love to learn.
- You are motivated to make a difference.
- You love to surround yourself with people who challenge you.
- You listen and learn from the diverse experience of others.
- You bring the best of yourself to work

If this sounds like you, but you're not sure if you're ready to be on the frontlines of client service, we've got you covered. You'll begin your journey with an industry-leading paid training program that runs about 1-2 months.

- Your training will get you equipped with the skills and knowledge to provide the best possible experience to CIBC clients – we know there's a learning curve and we're here to help.
- You'll initially participate in approximately five to six weeks of training with a mix of in-class learning and on-the-job application - typically from Monday to Friday.
- It's hands-on, so you'll get the real-life experience you need to rise to the challenge.

A quick note on your availability – our Contact Centre is open Monday to Friday, 8:00 am to 8:00 pm. We'd like for you to be flexible between these hours.

How You'll Succeed

- **Client Engagement** – Build rapport and establish positive working relationships with clients by using discovery questions and industry standard Know Your Client (KYC) questions to determine client needs and provide information on the right investment products or services.
- **Product Knowledge** - Provide detailed, factual and/or technical information on Savings, Income, Growth, Index and Managed Portfolio Solutions for various Mutual Fund account types. Open new Mutual Funds accounts and complete Mutual Fund transactions on existing accounts, including purchases, redemptions and transfers (buying and selling) from one fund to another by following all MFDA rules and regulations and completing a KYC before each interaction.
- **Problem Solving** - Listen, ask questions, and put yourself in the client's shoes. Act like an owner by taking accountability for client issues, and know when to lean on others to find the right solutions. Recognize and act on opportunities to engage clients in discussions of additional CIBC products and services.

Who You Are

- **You put our clients first.** You engage with purpose to find the right solutions. You go the extra mile, because it's the right thing to do.
- **You're driven to succeed.** You are motivated by accomplishing your goals and delivering your best to make an impact.
- **You give meaning to data.** You enjoy investigating complex problems, and making sense of information. You're confident in your ability to communicate detailed information in an impactful way.
- **You're a certified professional.** You have current accreditation and good standing Mutual Funds License (Canadian Securities Course or Investment Funds In Canada).
- **Values matter to you.** You bring your real self to work and you live our values - trust, teamwork, and accountability.

What CIBC Offers

At CIBC, our people are our greatest asset. You'll become part of a diverse community that acknowledges everyone's unique talents, and empowers teams to do what's right for the client, and to do it well. As part of our team, you will:

- **Thrive:** Benefit from an open and approachable culture that provides the flexibility and support you need to integrate your life at work and at home
- **Connect:** Work in a place where the right technology and infrastructure fosters innovation, collaboration and creativity
- **Develop:** Grow your skills and career through our best-in-class onboarding experience, ongoing learning opportunities, individual development planning and comprehensive product training
- **Prosper:** Share in our collective success with a competitive salary, incentive pay, banking benefits, health benefits program, and employee share purchase plan

What You Need to Know

- CIBC is committed to creating an inclusive environment where all team members and clients feel like they belong. We seek applicants with a wide range of abilities and we provide an accessible candidate experience. If you need accommodation during the application or interview process, please contact Mailbox.careers-carrieres@cibc.com
- You need to be legally eligible to work at the location(s) specified above and, where applicable, must have a valid work or study permit

Job Location

Toronto-5650 Yonge St. 19th

Employment Type

Regular

Weekly Hours

37.5

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Skills Summary

Sales

Consulted with clients to understand their expectations and worked under budget limitations.

Contacted company leads by phone to inform about product benefits and offers to get sales.

Analyzed customer needs and planned sales campaigns to achieve company objectives

Computer Skills

Proficient in Microsoft office software.

Computer programming experience.

Diagnosing and troubleshooting computer problems.

Knowledge of Banking & Financial Markets

Canadian Securities Course (CSC) graduate

CFA Level 1 Candidate for February 2021

Avid reader of financial news

3 work placements in Private Wealth Management (CIBC)

Administrative

Effectively answered customer questions in person, by telephone, and via email messages.

Used MS office software to keep records of clients, invoices, payments, and cancellations.

Education

Bachelor of Arts, Major in Philosophy / 4th year

Canadian Securities Course (CSC)

CFA Level 1 Candidate

Work Experience

Window Cleaner | JEM Window Cleaning | April 2016 – June 2016

Window, Eavestrough, Soffit/siding cleaning.

Organized and managed worker crews.

Office Manager | JEM Window Cleaning | July 2016 – August 2016

Promoted to office manager during the window cleaning season.

Tasks included receiving calls from customers, tracking company income and expenses, invoicing and billing customers, and other general office tasks.

Administrative Assistant | CIBC Wood Gundy – Park Place (Vancouver, BC) | May 2017 – August 2017

Handled client requests, preparation of client documents, as well as general administrative tasks.

Administrative Assistant | CIBC Wood Gundy – Bay-Adelaide (Toronto, ON) | May 2018 – August 2018

Administrative Assistant | CIBC Wood Gundy – Bay-Adelaide (Toronto, ON) | May 2019 – August 2019

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August 12, 2020

Hiring Manager
CIBC
5650 Yonge St, 19th floor
Toronto, ON M2M 4G7

Dear Hiring Manager

I am writing to you today to express my interest in re-joining CIBC in a mutual fund representative role. I am certain that I would be a good fit in this particular role given my interest and background in banking & finance. During the summers of my undergraduate degree, I worked in three different work placements for CIBC Private Wealth Management. These placements taught me the value of fostering strong relationships with the clients of the Bank. It was also an opportunity to learn about the variety of financial products available at the bank intended to suit each client's different investment objectives and risk tolerance. To further my financial education, I successfully completed the Canadian Securities Course (CSC) in my second year of University. The course has given me a strong background in various financial products such as stocks, bonds, mutual funds, etc. I am now studying to write the Chartered Financial Analyst (CFA) exams and will sit the L1 exam in February 2021. Given my interest in banking & finance, and my past work experiences, I believe that I would excel in this role. I would greatly appreciate your consideration in hiring me for this role.

Sincerely,

Max Foran

Max Foran
35 Balmuto Street, Suite 2108
Toronto, ON M4Y 0A3

August 11, 2020

Eileen Mancini, Investment Advisor
333 Bay Street, 28th Floor
Toronto, ON M5H 2R2

Dear Eileen,

I hope this letter finds you well. I am currently applying for a mutual fund representative role with the Bank and I am excited to continue the next progression in my career. I am writing to you to ask for your permission to list you as a reference on my application.

I enjoyed working with your team, and under your supervision, at CIBC Wood Gundy. Observing you interacting with clients in a positive and polite way taught me the value of fostering (and maintaining) strong relationships with the client. In addition to that, I learned plenty from your ability to lead our investment team.

I would greatly appreciate your help in this matter. If you would like a copy of my resume and/or the job posting, please do not hesitate to ask. I can be reached at max.foran@outlook.com.

Best Regards,

Max Foran

Max Foran
35 Balmuto Street, Suite 2108
Toronto, ON M4Y 0A3

August 11, 2020

Jenny Whelband, Senior Branch Administrator
1285 W Pender Street, Suite 400
Vancouver, BC V6E 4B1

Dear Jenny,

I hope this letter finds you well. I am currently applying for a mutual fund representative role with the Bank and I am excited to continue the next progression in my career. I am writing to you to ask for your permission to list you as a reference on my application.

I thoroughly enjoyed working in the Park Place Branch as it was my first taste of the investment world. I was most impressed with your interpersonal skills while working at the branch. Your friendly and professional attitude at work made the office a comfortable place to be. Furthermore, your leadership skills taught me the value of treating everybody with respect.

I would greatly appreciate your help in this matter. If you would like a copy of my resume and/or the job posting, please do not hesitate to ask. I can be reached at max.foran@outlook.com.

Best Regards,

Max Foran

Max Foran
35 Balmuto Street, Suite 2108
Toronto, ON M4Y 0A3

August 11, 2020

Peter Vondracek, Investment Advisor
333 Bay Street, 28th Floor
West Tower
Toronto, ON M5H 2R2

Dear Peter,

I hope this letter finds you well. I am currently applying for a mutual fund representative role with the Bank and I am excited to continue the next progression in my career. I am writing to you to ask for your permission to list you as a reference on my application.

I enjoyed working with under your supervision at CIBC Wood Gundy. Observing you interacting with clients in a positive and polite way taught me the value of fostering (and maintaining) strong relationships with the client. Furthermore, your work ethic demonstrated to me the keys to being successful in this profession.

I would greatly appreciate your help in this matter. If you would like a copy of my resume and/or the job posting, please do not hesitate to ask. I can be reached at max.foran@outlook.com.

Best Regards,

Max Foran