

Corporate Overview

Advico Professional Investment Services located in Sherwood Park is looking for an Advisor to join our team working within the financial industry. Advico aims to be Sherwood Park's leading financial services firm, providing wealth creation, financial planning, investing, lending and insurance services to a wide range of individual and corporate clients.

A career at Advico PIS will offer you the opportunity to:

- Work in a fast growing and exciting organization with professionals who believe in doing 100% the right thing for their clients 100% of the time.
- Perform challenging and interesting work in a team environment

Position Purpose

The focus of the role is to generate and develop new business by identifying potential clients through referral, networking, and marketing channels and to nurture the clients already retained.

Organizational Relationships

- This position reports to the assigned Senior Advisor.
- This position liaises with an Advisor's Assistant, Branch Manager, and other advisors.
- This position provides supervision to assistants.

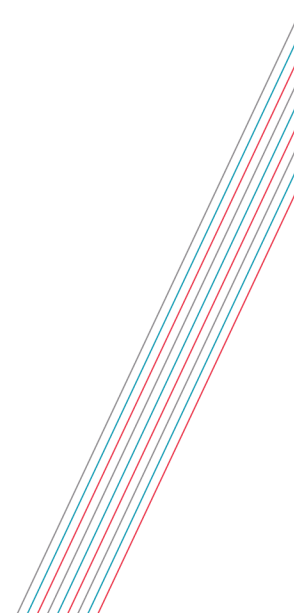
Key Accountabilities

Lead Generation

- Generate new business in target markets through various networking activities including attending events, networking groups, asking for referrals, and setting appointments with potential clients.
- Review existing clients to identify new business opportunities.
- Identify and refer new business opportunities to specialized advisors within Advico – group investments, group insurance, living benefits, and corporate work.
- Identify opportunities for seminars, sponsorships, and other promotional activities to leverage business generation activity.
- Find high-quality referral partners and encourage them to speak with a Senior Advisor.

Provide High Quality Advice

- Prepare plans for clients using FP Solutions or Blue Print and our Cash Flow House with distinct steps. This includes inputting the plan or giving the file to your assistant to input, working on solutions, selecting the best solution, and preparing same for presentation.
- Provide technically competent advice to clients, seek out information when required, and know the difference between the two.
- Stay current with and understand market news.



- Develop software expertise – FP Solutions, Blue Print, and Outlook.

Client Relationships

- Effectively manage the relationship between the client and Advico encouraging clients to use the friendly services of your Advisor's Assistant as well.

Sales

- Achieve agreed sales targets with respect to assets under management, trailers, and expenses.
- Contribute to the establishment of corporate sales targets.

Market Intelligence

- Monitor competitor activities and pro-actively provide advice as appropriate to Senior Advisors.
- Develop product knowledge.
- Complete CE courses.

Requirements

- Post-secondary degree
- CFP designation or commitment to complete CFP within first year
- CSC designation
- LLQP designation

Ideal Candidate Attributes

- Credibility
- Contacts
- Character
- Instant Value
- Experience
- Park Resident
- Designations
- Existing Book
- Confidence
- Branch Mgr Approval