

MD Physician Services, a Canadian Medical Association company, provides financial and practice management services to Canadian physicians.

The Regional Lead, MD Private Investment Counsel is responsible for implementing and maintaining strategy for best-in-class professional practices and staffing models for the Investment Counsellors (ICs). The incumbent will develop and implement strategies aligned with the integrated direction and structure of MD Physician Services Inc. In addition, he/she is responsible for the coaching, training and development of ICs in Western Canada and assisting with business planning and financial reporting.

Duties & Responsibilities:

Key Accountability and Objectives:

- Responsible for about 50 clients as an Investment Counsellor
- Work closely with the Vice President, National Lead MD Private Investment Counsel (MD PIC), the AVP Operations and Risk Management MD PIC, the Regional Leads MD PIC, as well as Regional Managers/Vice-Presidents to develop, implement and maintain strategy for best-in-class investment counselling professional practices, client / investment processes, staffing models, etc. within Western Canada
- Provide education and training to new and existing front office staff (Investment Counsellors / Regional Investment Administrators / Regional Managers)
- Main business contact and accountability for working with internal registrations office in respect to the OSC and other provincial securities commissions for investment counsellor registration issues
- This position will work closely with the MD PIC front office to support current and evolving needs
- Position will also act as a back-up to Regional Leads MD PIC and the Regional Managers/Vice Presidents with respect to Investment Counselling issues
- Involved in coaching ICs in Western Canada (and other regions as required) regarding best practices
- Involved in recruiting ICs for the Western Canada

Direct Strategic Accountability:

- Ensure Investment Counsellors remain effective in their management and construction of client portfolios.
- Develop and implement both strategy and tactics for our front office (Investment Counsellors / Regional Investment Administrators / Regional Managers) team to move towards a best-in-class private client experience, in line with the integrated direction of MD Physician Services Inc. This strategy would entail benchmarking our current processes and experience with both our MD wealth partners and external competitors and developing an executable plan. A sub-strategy would be to provide direction for the development and implementation of the needed front office training curriculum (in partnership with Learning & Development) with respect to investment / technical skills and relationship / selling skills.

Direct Functional Accountability:

- Maintain field staff models and process – includes assisting in the development of the compensation model for Investment Counsellors and Regional Investment Administrators.
- Compliance process and functions as it relates to day-to-day responsibilities of Investment Counselors
- Assist with business planning and financial reporting

Education & Experience:

- University degree or equivalent relevant work experience
- CFA designation, capable of getting registered as IC / PM and the Canadian Securities Course
- Strong leadership ability to lead real and virtual teams
- Strong interpersonal, organizational and analytical skills
- Proven track record of performance excellence meeting targets and objectives while providing exceptional customer service
- People development and training with a proven track record of remaining competitive in the market place
- Demonstrated excellence in strategic or tactical analysis and planning
- Ability to recognize and interpret business issues/opportunities and recommend solutions through analysis

Competency Requirements:

- Solid communication and interpersonal skills
- Dynamic presentation\public speaking skills
- Integrity and trust
- Leading and managing change
- Proven leadership ability
- Successful relationship and team builder
- Established networking, business development and sales skills
- Effective manager with the ability to measure work\processes
- Goal and action oriented

This is your opportunity to contribute to a corporate culture based on teamwork and service excellence.
For more information, visit www.md.cma.ca/careers to register and apply online.