

BMO Harris Private Banking
Senior Investment Counsellor
Location: Saskatoon, Saskatchewan

Mandate

The Senior Investment Counsellor is accountable for contributing to the regional business plan by effectively servicing existing relationships and increasing the number of new clients with the objective of contributing to the overall success of BMO Harris Private Bank. The Senior Investment Counsellor has a very strong focus on identifying and referring potential business opportunities to BMO Financial Group & BMO Harris Private Banking business partners and exhibit strong team building skills. The position requires an individual with strong ethical values that always has the client's best interests ahead of their own.

Key Accountabilities

1. Relationship Management

- Responsible for managing all types complex relationships including personal, corporate, trusts and foundations both registered and non registered.
- Has the ability to effectively evaluate a client's holistic wealth needs and then create and implement an investment policy statement, asset allocation, investment portfolio and financial plan.
- Conducts client reviews and effectively adapts and modifies client portfolios and financial plans to the ever-changing client situation and financial marketplace.
- Manages and continually enhances the client experience through strong relationship management and ongoing in depth communication

2. Investment Management & Financial Planning

- Has a strong level of investment management understanding and proficiency and is able to clearly communicate BMO Harris Investment Management Inc.(BHIMI's) investment strategies to clients.
- Strong knowledge and understanding of Financial Planning principles and is able to incorporate into each client's personal and financial situation.
- Ability to craft and implement basic financial planning strategies to help clients achieve their financial and personal goals.
- Recognized as having strong experience in discretionary money management for High Net Worth Individuals (HNW).
- Effective implementation of client strategies, management of investment portfolios and ongoing evaluation of performance within parameters dictated by each client's customized investment policy statement.

3. Business Development

- Ability to identify new business opportunities from within existing book of business.
- Continuously look for ways to enhance BMO Harris Private Banking presence in the marketplace by crafting innovative business development strategies and works closely with other BMO Harris Private Banking professionals in support of their business development activities.
- Responsible for developing profitable new business leads through extensive external networks.

- Has a strong level of understanding of the financial services, financial planning and investment management industries to effectively implement appropriate business development strategies.

4. Team Effectiveness

- Supports a work environment that inspires innovation, creativity, collaboration, diversity and demonstrates a high tolerance and flexibility for change.
- Provides insight and shares expertise with team members in regards to investing and financial planning.
- Ensures compliance policies and procedures relating to private client money management and existing risk management procedures and controls are being followed.

5. Project Management

- May be required to assist with ad-hoc projects in support of the regional executive committee and SVP & Regional Director - Investment Management.

Candidate Profile

Essential / mandatory requirements:

- CFA designation
- Registered, or eligible for full registration, as an IC/PM in Saskatchewan
- At least 5 years' investment management experience within an investment counseling, investment research or discretionary investment environment
- A passion for providing exceptional client service, with superior interpersonal and communication skills.
- Strong business development experience with successful track record.
- Strong Team player
- Proficient in Microsoft Office
- Able to work independently without direct supervision
- Personable and pleasant demeanor
- Willingness to travel (50%)

To Apply

- To explore this opportunity further, please apply online by visiting <https://careers.bmogc.com> and selecting to job id **61971**
- Resumes may also be sent to Search.Recruitment@bmo.com .Please reference **Senior IC Saskatoon, SK** in the subject line.

We thank all candidates in advance, however, only those being considered for an interview will be contacted.