

Bilingual Inside Sales Representative



POSITION DESCRIPTION

As a key member of the sales team, the Inside Sales Representative partners with the Regional Sales Manager to develop business relationships with financial advisors. This position is responsible for ensuring the effective execution of sales targets and corporate objectives through contact, sales and service goals.

PRIMARY RESPONSIBILITIES

- Drive results by executing and delivering against business plan and objectives
- Work directly with the Regional Sales Manager to identify key investment partners and deliver a strong execution strategy to ensure exemplary advisor service and support
- Initiate contact with financial partners and prospects to provide information about products and solutions
- Provide day-to-day support services to the Regional Sales Manager
- Assess the business needs of financial advisors and provide solutions through EdgePoint Portfolios
- Determine priorities and tasks necessary to ensure the success of territory growth and maintenance

QUALIFICATIONS

Education and Experience

- Post-secondary education
- 3+ years financial services experience
- Direct sales experience an asset
- Canadian Investments Funds Courses (CIFC), Canadian Securities Course (CSC) or other industry-related courses preferred

Skills and Knowledge

- Bilingual in French and English
- Solid understanding of Canadian financial markets
- Ability to build credibility and rapport with clients over the phone
- Strong listening, verbal and written communication skills
- Strong customer relationship management skills
- Ability to work in a team environment

Interested applications should send e-mails to: wearegrowing@edgepointwealth.com

ABOUT EDGEPOINT:

EdgePoint Wealth Management Inc. is an independent employee-owned investment management firm based in Toronto that partners with financial advisors across the country to distribute its investment products. It offers mutual funds that are designed with the goal of building long-term wealth for investors.