



As we continue to grow and expand our reach, we are seeking a dynamic and passionate **Financial Services Representative** to join our team.

More about this position:

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| <b>Overview</b>                | The Financial Services Representative will foster relationships with clients, to understand their financial and personal goals, enabling you to provide informative and tailored service, and recommend the right products and services that will help with their financial success.  |
| <b>Key Responsibilities</b>    | <ol style="list-style-type: none"> <li>1. Meet with and communicate with loan clients to receive applications, sign documents, and manage relationships.</li> <li>2. Manage client relationships by meeting with and communicating with investment clients to discuss investment objectives, and review and recommend products that meet their needs.</li> <li>3. Prepare documents for all files and ensure organization of files is orderly and complete.</li> <li>4. Complete annual maintenance of loan and investment portfolio including review of loan and investment files and required client disclosure.</li> <li>5. Other duties as assigned.</li> <li>6. Support and maintain a positive team culture in alignment with Amity Trust's vision, mission, and values.</li> </ol> |
| <b>Qualifications</b>          | <ol style="list-style-type: none"> <li>1. Bachelors degree in Commerce, Finance or Business Administration or equivalent experience.</li> <li>2. Personality that enables building strong relationships with clients.</li> <li>3. Experience working with email, spreadsheet, word processing and client relationship management software.</li> <li>4. Excellent written and verbal communication skills.</li> <li>5. Strong organizational skills, enabling the handling of multiple competing priorities.</li> <li>6. Ability to work independently and collaboratively in a small team environment.</li> </ol>   |
| <b>Reporting Relationships</b> | Chief Financial Officer & Chief Investment Officer  |
| <b>Working Conditions</b>      | Location: Waldheim office.<br>Hours: 37.5 hours/week if full time   |

Salary and benefits will be commensurate with training and experience of successful applicant. Interested applicants are invited to send their resume and cover letter to [jobs@amitytrust.ca](mailto:jobs@amitytrust.ca).