

Financial Services Manager in Training-1400001631

Description

The Financial Services Manager is a key branch role, with knowledge of financial solutions and BMO products across every-day banking, investments and lending.

By conducting complete conversations, Financial Services Managers simplify the complex, understand our customers' needs, and guide them with the right options and solutions.

Customer Accountability

- Engage customers in complete, needs based conversations to simplify the complex, understand our customers' needs, and guide them with the right options and solutions.
- Complete applications and close sales as part of customer interaction
- Document identified opportunities, and changes to customer situations and potential needs
- Ensure calendars are full by proactively pre-booking customer appointments
- Walk the floor: spend a minimum of one hour per week walking the branch floor to engage customers and look for opportunities to book appointments
- Proactively contact customers: make out-bound calls from leads and multiple customer databases.

Team Accountability

- Attend and actively contribute to daily and weekly branch meetings
- Meet with Customer Service Representatives to collaboratively look for opportunities to fill appointment calendar for the week
- Meet with Branch Partners to discuss appointments and cross-referral opportunities

Training Accountability

- For internally-delivered courses, complete all pre-work, pre-reading, and attend all virtual classroom sessions leading up to and between off-role courses
- Consult Learning Library as needed to reinforce and supplement knowledge gained in training courses
- In preparation for RISR exam, dedicate 1-2 hours per day to self-study

Organizational Accountability

- Discuss performance and complete Coaching for Performance Assessment with BM bi-weekly
- Conduct one customer appointment with BM side-by-side bi-weekly, and receive feedback
- Adhere to Bank Policies and Procedures for the prevention of loss due to fraud, counterfeiting, money laundering or defalcation, identify and report suspicious and other reportable transactions or patterns of activity that are suspected to be related to money laundering
- Protect the Bank's assets and maintain the quality of the lending portfolio by ensuring adherence to lending process requirements, and established yield, quality, diversification and risk guidelines
- Comply with all regulatory, legal and ethical requirements

Qualifications

- University degree or equivalent work experience.
- Completion of the Financial Services Manager development program at BMO or at least one year of equivalent training/experience at another financial institution.
- Eligible to be a Registered Investment Sales Representative (RISR) registered and lending qualified.
- Candidates must be willing to participate in a 6 month training program to progressively gain knowledge and build their capabilities.
- Candidates who do not meet the minimum requirements will be considered an Financial Services Manager in-training until they have fully completed the requirements to become a fully qualified Financial Services Manager.

Schedule: Must be fully flexible from Monday to Saturday.

At our company, we have been helping our customers and communities for over 195 years. Working with us means being part of a team of talented and passionate individuals with a shared focus on working together to deliver great customer experiences. We stand behind your success with the support you need to turn your potential into performance.

