

Careers, by BUTTERFIELD.



Take a step in the right direction.

At Butterfield, we provide financial services with a personal touch, we focus on results, we value relationships, and we celebrate success. If that sounds like your kind of company, then consider this opportunity to become part of a collaborative team of professionals at the world's leading, independent offshore bank and trust company.

Assistant Vice President, Relationship Manager- Brokerage

This position reports to the Vice President, Investor Services, and is responsible for promoting Butterfield's investment products and services, cross-selling other products and services, building client relationships and assisting clients with their financial goals and requirements.

Your responsibilities will include:

- Establishing and maintaining client relationships with new or existing clients by selling investment products including a range of mutual funds, self-directed brokerage and advisory services and discretionary portfolio management services.
- Determining the strategies and products that will best meet clients' needs based on accurate information about their financial situation, goals and objectives.
- Generating new sales leads via prospecting
- Presenting to groups and individuals to educate and promote Butterfield's products and services.
- Responding to walk-in clients that require investment advice, assistance with transactions or have queries pertaining to their account(s).
- Maintaining sales tracking information as required.
- Assisting the team to meet departmental targets and goals.

Your qualifications and skills include:

- University Degree in Business
- Canadian Securities Course (or Equivalent) or recognized Professional Financial Planning Course(s)
- Hold the CFA designation (or preparing to write the CFA exam)
- Experience in sales or customer service. Previous Equity, Fixed Income and options trading experience an asset
- Excellent organizational, interpersonal and communication skills
- Highly motivated, conscientious and able to work as a team player
- Strong computer skills with knowledge of Microsoft Office
- Knowledge of all KYC requirements and regulations

Asset Management

The Asset Management team helps our clients to grow, manage and preserve their wealth through a selection of investment products, management services and brokerage options. We work with clients to develop investment strategies and construct tailored portfolios to meet their investment objectives, risk attitude and liquidity requirements. Our clients include individuals, charities, pension plans, trusts, institutions and insurance entities.

Why Butterfield?

Butterfield is a leading independent offshore bank and trust company. With more than 1,300 financial services professionals across ten international jurisdictions, the Butterfield experience is enhanced by robust learning and development opportunities, comprehensive benefits, and preferred rates on a variety of proprietary financial services. Guided by our core values of approachable, collaborative, empowered and impactful, we provide a respectful environment where we value the diversity of our employees and the talents and experiences they bring. With a 160-year tradition of service excellence we empower individuals to achieve their potential and make a positive impact on our business, our clients and our communities.

Does this sound like you?

All applications should be forwarded via email to resumes@butterfieldgroup.com.

Closing date:

Thursday, 26 May 2022

Let's start a conversation.



butterfieldgroup.com

