

Careers, by BUTTERFIELD.



Take a step in the right direction.

At Butterfield, we provide full-service community banking and specialised international financial services. Operating in multiple jurisdictions, we focus on results, value relationships, and celebrate success. If this sounds like your kind of company, then consider this opportunity to become part of a collaborative team of professionals at a world-leading, independent offshore bank and trust company.

Relationship Manager – Investment Centre

Reporting to the Vice President, Investor Services, this position is responsible for building strong client relationships and assisting clients with their financial goals and requirements. This role is also responsible for the promotion of Butterfield's investment products and services, in addition to cross-selling banking products.

Your responsibilities will include:

- Establishing and maintaining client relationships with new or existing clients by selling Butterfield's investment products, which includes a range of mutual funds, self-directed brokerage and advisory services in addition to discretionary portfolio management services.
- Using relationship management skills and techniques to meet with clients and accurately capture their personal and financial information, including financial goals and objectives, and determining the strategies and products that will best meet their needs.
- Generating new sales leads via prospecting in order to sell products to retail and high net worth individuals.
- Presenting to large groups as well as individuals about Butterfield's products and services.
- Remaining prepared and available for walk-in clients that require investment advice, assistance with transactions or have queries pertaining to their account(s).
- Maintaining a strong knowledge of all KYC requirements and regulations surrounding the account opening process.
- Assisting with cross-training efforts and developing a rapport with co-workers across teams to encourage referral business.
- Maintaining sales tracking information as required.
- Assisting the asset management team to meet departmental targets and goals.

Your qualifications and skills include:

- University Degree in Business and demonstrated experience in sales or customer service.
- Canadian Securities Course or recognised Professional Financial Planning Course(s) would be an asset.
- Excellent organisational, interpersonal and communication skills required, in addition to strong client service and business development abilities.
- Highly motivated, conscientious and able to work as a team player.
- Strong computer skills with knowledge of Microsoft Office.

About the team

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?

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—approachable, collaborative, empowered and impactful—we provide a respectful environment where the diversity of our employees and the talents and experiences they bring are celebrated and valued. With a 160-year tradition of service excellence, we empower individuals to achieve their goals and make a positive impact on our business, our clients and our communities.

Does this sound like you?

All applications should be forwarded via e-mail to resumes@butterfieldgroup.com.

Closing date:

Tuesday, 31 January, 2022

Let's start a conversation.



butterfieldgroup.com

