Financial Advisor

Be at the heart of industry-leading client relationships

At CIBC, we're building a relationship-oriented bank for the modern world. For over 150 years, we've helped make our clients' ambitions a reality. We've helped them own their homes, build their businesses and secure their financial future. We need talented, passionate professionals who are dedicated to doing what's right for our clients. Help us keep the tradition alive.

CIBC Imperial Service Financial Advisors are the coaches our clients need on their financial planning journey. As a Financial Advisor, you'll build lasting relationships with clients, partners and mentors as you nurture and grow a dedicated portfolio of clients. You'll provide tailored advice and solutions in all areas of financial planning including day-to-day banking, investments, lending and estate planning. Your leaders will empower and support you, and we'll invest in you through continuous education, professional development and accreditation such as the PFP, RRC and CFP.

Through the relationships you build with our clients, you'll come to understand their goals, build their financial plan using advanced CIBC tools and give them the right advice to help them make well-informed choices for their future. It's more than investing. It's a personalized plan based on each client's most important life events. It's a relationship built on trust, teamwork and accountability.

Professional experience

A successful Financial Advisor is someone who:

Attributes

- Is trustworthy
- Is proactive and resourceful
- Is intellectually curious
- Is organized
- Strategically grows their business

Client complexity

- Develops strong relationships and collaborates with clients to build tailored financial plans
- Actively engages clients each year to discover needs through planning and advice-based conversations
- Begins to establish a brand of service and sales excellence with clients and colleagues
- Provides four-quadrant advice and solutions to clients with low to moderate complexity

Accreditation

- Has completed the Canadian Securities Course (CSC) or Investment Funds in Canada (IFIC). PFP or RRC(Quebec) recommended
- Meets requirements for CIRO or AMF licensing

In Ontario, the Financial Planner and Financial Advisor titles can only be used by employees who hold an approved accreditation from an approved credentialing body, in accordance with the Financial Professionals Title Protection Act and regulations.

Knowledge and experience

- Has 1-3 years of experience providing advice and establishing relationships
- Clearly communicates a value proposition
- Delivers four-quadrant plans and takes initiative to understand and resolve objections and needs
- Engages and collaborates with partners to develop plans to achieve clients' goals
- Prioritizes and manages multiple responsibilities while achieving performance targets
- Builds and develops a network of centres of influence
- Confidently communicates through negotiation the value of the recommendation
- Has a strong understanding of compliance and regulatory requirements

Achieve your career ambitions

Financial Services Representative

Financial Service Associate

Associate Financial Advisor/Associate Financial Services Specialist

Associate Business Advisor

Manager, Client Advice

Financial Advisor

Business Advisor

Sr. Business Advisor

Sr. Financial Advisor

Investment Planning Specialist

Mobile Mortgage Advisor

Banking Centre Leader

Sr. Financial Planner

Financial Planning Consultant

Business Planning Consultant

Learn more about how we're helping clients plan for the most important things in life