

**Position:** Investment Advisor (Private Client Sales)

**Reports to:** Vice President, Business Development and Institutional Sales

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## **OVERVIEW**

Reporting to the Vice President, Business Development and Institutional Sales, the Investment Advisor (Private Client Sales) is responsible for the professional administration and management of retail sales activities and client relations for Centurion Asset Management.

The Investment Advisor (Private Client Sales) is accountable for the management of investment related resources to ensure that Centurion Asset Management sales of Units to qualified investors are effectively and efficiently administered and managed to established standards.

## **RESPONSIBILITIES**

### **1. Relationship Development**

Develop and foster positive relationships with internal and external stakeholders. Ensure proactive timely resolution of investor concerns.

### **2. Customer Service**

Professionally and courteously handle investor inquiries and requests to ensure that a high level of client satisfaction is achieved through constant and consistent attention to Centurion's Vision, Mission, and Values.

### **3. Ongoing Operations**

Answer the Invest phone line, responding to inquiries and requests or redirect calls as needed. Provide clients with current marketing materials when requested.

### **4. Retail Sales**

Close sales through proactive calls and emails to company generated prospects and provide interested parties with information and materials, as requested. Maintain current investor relations, as well as an accurate investor contact and mailing list. Manage sales documents and related communication with investors and provide any follow-up, as required. Organize and update client sales database. Provide information emails to investors. Manage post-sales inquiries and requests and provide current investors with information and documents, as required. Manage the new direct investor subscription process.

## **REQUIREMENTS**

- A passion for excellence in client services and investor relations.
- Post-secondary degree/diploma in business, sales, or related field.
- Passing the Exempt Market Dealer Representative course exam within 6 months from date of hire is a conditional requirement.
- Minimum 5 years sales experience; experience in the securities and/or real estate industries would be an asset.
- Exceptional oral and written communication skills
- Excellent organizational skills, with a strong ability to multi-task.
- Exceptional interpersonal skills.
- Excellent command of MS Office products: Word, Power Point, Excel.
- Detail-oriented; able to resolve problems using relevant information, sound reasoning and common sense.
- Forward thinking; able to take the initiative in acquiring and implementing skills specific to the position.
- Excellent follow-up skills with the ability to effectively resolve issues in a timely matter.