

FINDING

Work in ...

Informing
Attracting
Developing
Retaining



FINANCIAL SERVICES REPRESENTATIVE

QUICK FACTS

- Employed by:
 - Banks and credit unions.
 - Insurance, investment, and financial planning companies.
 - Real estate and mortgage companies.
- Must understand the needs of the customer.
- Ability to provide the right financial or insurance services to meet the customer's needs.



NATURE OF WORK

- Selling various financial and/or insurance products.
- Helping clients decide on their personal and financial needs.
- Promoting the sale of all personal banking, financial and insurance products and services.
- Collecting information required for to provide services.
- Following employer codes of conduct.
- Following the industry laws and regulations.
- Giving good advice to customers.
- Making sure that customer problems are handled well.
- Keeping detailed client files.
- Keeping client information private.

- Providing a good customer experience.
- Adding to a positive work environment.
- Taking part in performance assessments.
- Meeting professional development goals.
- Attending meetings and coaching sessions.
- Following employer policies and procedures.
- The wage range for a financial services representative in southeastern Alberta is \$14.47 per hour to \$21.74 per hour.
- Bonuses and commissions may be available.
- For additional information, visit www.alis.gov.ab.ca (NOC#1433).

WHAT EMPLOYERS LOOK FOR

- Post-secondary education (business degree or diploma) is an asset.
- Industry experience is an asset.
- Mutual Fund License for the financial industry.
- A recognized professional industry designation, if required.
- Excellent oral and written communication skills.
- Self-motivated.
- Attention to detail.
- Ability to multi-task and solve problems.
- Ability to sell themselves and, in turn, products or services.
- Good interpersonal skills.
- Able to take initiative.
- Strong commitment to work.
- Confidence and maturity.

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RELATED TRAINING OPPORTUNITIES

- On-the-job or additional training may be provided.
- Mutual Fund License may be obtained through the employer.
- Various licensing courses are available through industry associations.
- Business education is available through the Medicine Hat College (www.mhc.ab.ca).
- Opportunities for advancement within the banking industry are generally posted and can be applied for all across Canada.
- Successful candidates are chosen based on their job performance, experience, and their ability to sell themselves.
- Advancement to supervisory positions is possible with experience and training.
- Visit the **Corporate Education Network** for additional training opportunities specifically in Southeast Alberta (www.cenetnetwork.ca).

HOW TO APPLY

- Hiring procedures vary depending on the employer. Generally, job seekers are to submit a resume or complete a company application form.
- Apply in person, by email, mail or by fax directly to the company office.
- In some cases a company application form may be available on-line on the company website.
- An individual interview may follow.
- Check www.jobbank.gc.ca for current job listings in Southeast Alberta.

POTENTIAL EMPLOYERS

- Alberta Motor Association, Medicine Hat (www.ama.ab.ca)
- ATB Financial Agent, Bassano, Brooks, Medicine Hat, Oyen, Redcliff (www.atb.com)
- Bevan Halbert Gerrard & Mossey, Brooks
- BMO Bank of Montreal, Brooks & Medicine Hat (www.bmo.com)
- Bru Agencies Western Financial Group, Hanna (www.atb.com)
- Cedar Square Insurance, Medicine Hat (www.cedarsquare.com)
- Chinook Credit Union, Bassano & Brooks (www.chinookcu.com)
- CIBC, Brooks, Medicine Hat & Redcliff (www.cibc.com)
- Community Savings (Credit Union), Bow Island, Medicine Hat & Redcliff (www.communitysavings.com)
- Investors Group Financial Services, Brooks & Medicine Hat (www.investorsgroup.com)
- Medicine Hat Insurance (www.mhinsurance.com)
- Meyers Norris Penny Ltd., Brooks & Medicine Hat
- Newell Agencies, Bassano
- RBC Dominion Securities Inc., Medicine Hat (www.rbcinvestments.com)
- RBC Royal Bank, Brooks & Medicine Hat (www.royalbank.com)
- Reliance Insurance Agencies, Medicine Hat (www.reliance-insurance.ca)
- RIF Services Inc.
- Scotiabank, Brooks & Medicine Hat (www.scotiabank.com)
- TD Financial Group / TD Canada Trust, Brooks & Medicine Hat (www.tdcanadatrust.com)
- Thompsen Fisher Insurance Ltd., Medicine Hat (www.thompsenfisher.com)
- Thompson Schindle Green Insurance & Financial Services, Brooks & Medicine Hat (www.tsginsurance.com)
- Wells Fargo International, Medicine Hat (www.wellsfargo.com)
- WKB / Newell Agencies, Brooks (www.westernfinancialgroup.com)