



**JOB TITLE:** Training Specialist  
**DEPARTMENT:** Advisor Relations, Worldsource Wealth Management Inc. (“WWM”)  
**REPORTS TO:** Manager, Training and Development  
**LOCATION:** Markham, ON or Vancouver, BC (Hybrid)

**JOB STATEMENT:**

Reporting to the Manager, Training and Development and working in a fast-paced environment, the Training Representative will be responsible for delivering unparalleled training and customer service to both internal and external clients on both MFDA/IIROC platforms. The candidate will be responsible for analyzing, researching and taking the initiative for resolving issues in a proactive manner. Additionally, the candidate will take personal responsibility for identifying client needs and providing service excellence while continuously looking for ways to improve quality service delivery.

**ESSENTIAL FUNCTIONS:**

- Training Worldsource Financial Management Inc. and Worldsource Securities Inc. branch offices and head office staff IIROC and MFDA platforms, tailoring material to suit;
- Creation of material for online learning modules and participation/presenting in monthly branch webinars;
- Conducting prospect demos for potential new advisors;
- Conducting Dataphile testing including: creating/following test scripts and documenting results;
- Participating in annual review of training guides on the portal and suggesting updates;
- Developing and maintaining excellent relationships with advisors through email, conference calls and scheduled office visits;
- Analyzing, researching and responding to client inquiries in a proactive manner; and
- Performing other duties as assigned.

**JOB SPECIFICATIONS:**

- Post-secondary degree or equivalent experience
- IFIC or CSC an asset
- 10 years similar experience within the investment industry
- Effective written and communication skills
- Willingness to work independently
- Effective management of projects, timelines and priorities
- Strong customer focus and strong professional acumen
- Strong problem solving, analytical and conflict resolution skills
- Superior communication, organizational and listening skills
- Familiarity with the Dataphile is preferred.
- Excellent PC skills
- Ability and willingness to travel within Canada
- Bi-lingual is an asset

## **COMPENSATION:**

Commensurate with experience

*If you are interested in applying for this position, please forward a cover letter and resume in confidence to [careers@worldsourcehealth.com](mailto:careers@worldsourcehealth.com).*

*Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.*

*We thank all applicants for their interest but only those selected for an interview will be contacted.*