Investment Planning Counsel™
FINANCIAL SOLUTIONS FOR LIFE

Job Posting

Posting Date:	July 21, 2010	Start date:	August 2010
Position Title:	Regional Coordinator	Location:	Penticton, BC
Position Type:	Full time, permanent	Reporting To:	Regional Director of Distribution

Job Objectives and Summary:

The Western Region Head Office is responsible to act as a conduit to the Head Office and acts as the resource for advisors in the Western Region.

The Regional Coordinator's primary responsibility is to provide on-going advisor services for business development and assist with compliance and office operations. The position requires being the first stop for all advisor questions and being able to provide correct/appropriate direction.

The role reports to the Regional Director of Distribution, BC ("RDD") and will be working with the VP of Business Development ("VPBD") for product development and increase advisor awareness of the IPC Product lines.

Job Responsibilities:

Advisor Support & Product Development:

- Work with the VPBD to coordinate regional events.
- Assist Regional Vice President with preparing business plans for TCE advisors (Counsel Portfolio Services).
- Keep track of TCE advisors, prepare modules, and coordinate appointments & branch visits for VP as required.
- Develop strong relationships with advisor by providing account management support & contact
- Act as a liaison with the product development people and the advisor to ensure awareness, track attendance as well as feedback. Refer more complicated transactions / concepts or escalated issues to Sr. Product Specialists.
- Survey IPC Advisors to obtain formal and informal feedback and provide reports to the VPBD and the RDD on advisor feedback and suggested solutions on future training sessions.
- Secure training locations must be cost effective and meet all requirements of the seminars or training sessions.
- Reconcile Regional VP's Amex Statement monthly.
- Prepare and distribute recruiting packages for VP, schedule branch visits telephone appointments.

Administrative Support:

- Provide back up to the administrative assistant during lunch breaks and holidays.
- Filing and organization of files.
- Tracking out-of-province Advisors (with BC Clients) to ensure all paperwork has been received and is on file, follow-up on any and all missing paperwork (NAAFs, KYCs, Trade Tickets).
- NAAF / W. Connect checking / inputting and filing for Head office as required.
- Prepare / organize / maintain Head Office files as required.
- Prepare branch training files for transitioning advisors to give to Regional Director of Distribution.
- Follow up on deficiencies re: NAAFs, KYC updates, trade tickets.

Compliance Branch Review:

- Assist Branch Compliance officer in preparing for branch reviews.

Skills and Knowledge Requirements:

- Minimum of 1 year of work experience in the office environment setting is required
- Minimum completion of high school; completion of college in business or business administration is preferred
- Strong relationship building skills
- Completion of Mutual Funds Course or Securities Course is an asset
- Very good working knowledge of all MS Office programs (Word, Excel, Outlook); good typing speed
- Excellent organizational and follow-up skills; able to self-manage own tasks/projects
- Excellent interpersonal and team-work skills; must be able to work independently and under minimum supervision as well as part of the team
- Excellent English communication skills; ability to convey information in a professional manner
- Very good attention to detail

Please forward your résumé and letter of interest to: Human Resources, Investment Planning Counsel Inc. by e-mail at: careers@ipcc.ca. All applications should be forwarded by July 30, 2010.

In the body of your email or covering letter please indicate the following:

1. Number of years of relevant work experience
2. Number of years of industry experience
3. Salary expectations.

We thank all applicants for their interest; however, only those selected for an interview will be contacted.

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