Senior Business 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.

As a Senior Business Advisor, you'll deliver flexible and innovative product solutions, dedicated business expertise and timely advice to help clients realize their goals. You'll deepen client relationships that require multiple complex business solutions including Cash Management solutions, conducting treasury diagnostics, developing credit solutions and developing proposals to meet the needs of clients.

Through the relationships you build with our clients, based on their needs, you'll come to understand their immediate and long term business and personal goals and identify opportunities to further deepen the CIBC relationship. The emphasis is on ensuring clients' business and personal - related investments, financial and credit needs are met by providing a comprehensive business banking offer. It's a relationship built on trust, teamwork and accountability.

Professional experience

A successful Senior Business Advisor is someone who:

Attributes

- Builds strong relationships
- Influences others and gains agreement from stakeholders
- Thinks critically and executes thoughtfully
- Takes initiative in handling complex client situations
- Has strong attention to detail
- Pivots strategy based on changing environments

Client complexity

- Engages partners to enhance client discussions on planning such as cash management, lending and transition of wealth
- Engages in intergenerational discussions with families
- Builds comprehensive plans based on various income structures
- Manages or appropriately refers questions related to tax and succession planning or non-resident clients

Accreditation

- You have current accreditation and good standing in The Canadian Securities Course (CSC)/Canadian Investment Funds Course (CIFC) OR you are willing to obtain Canadian Investment Regulatory Organization (CIRO) license within 90 days of hire
- Meets requirements for Canadian Investment Regulatory Organization (CIRO) or Autorité des marchés financiers (AMF) licensing

Knowledge and experience

- Has 2-3 years of advisory experience managing 150 connections with a focus on business relationships
- Confidently delivers a value proposition and has an experienced level of client service
- Proficiently interprets and analyzes financial statements
- Specialized advice and planning for business and personal banking clients with complex cash flow needs
- Understanding how cash management solutions will benefit a business client's specific needs
- Develops credit solutions to properly meet borrowing needs and satisfy CIBC's risk management policies
- Negotiates for clients and can structure a strong business case
- Proactively grows community business roots with owners and neighbours, while expanding personal centres of influence
- Explains complex investment concepts and market insights to clients and colleagues in easily understandable terms
- Collaborates with partners and identifies referral opportunities to achieve clients' goals
- Uses experience to mentor team members as they develop their knowledge and skills
- Has developed knowledge of business products and services
- Manages daily activities while executing on an annual business plan

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