



WEALTH ADVISOR

DUTIES

- The wealth advisor provides private bankers with legal and tax advice and expertise. As a genuine source of technical value-added in client meetings, he/she participates in client development and retention.
- Equipped with strong analytical and synthesizing capabilities, he/she prepares research studies and memoranda for clients and prospects. He/she participates in the updating of the Bankers' skills through informational and training initiatives.
- His/her writing skills represent an asset, as he/she contributes to the promotion of the Bank's image in the general and trade press and oversees the annual publication of a thematic booklet.