

## CAREER PROFILES

### Financial Sales Representatives:

**Financial Sales Representatives** sell basic deposit, investment, and loan products and services to individuals and businesses. They meet with clients to discuss financial goals, investment timelines, and risk tolerance. They must constantly monitor the markets and economy and evaluate how changes in finances can affect taxes and client situations.

### Wage/Salary Information:

\$29,000 is the median annual salary found in provincial job-postings.

\$20.19/hour is the median wage reported locally.

### Commonly Listed Skills in Job Postings:

- Oral and written communication
- Detail oriented
- Analytical skills
- Microsoft Office
- Problem solving
- Organizational skills
- Self-motivated
- Financial modeling
- Teamwork
- Marketing
- Management
- Interpersonal
- Bilingual
- Presentation
- Time management
- Creativity

### Job Duties:

Financial Sales Representatives meet with clients to discuss financial goals, investment timelines, and risk tolerance. They then assist clients by proposing solutions to address these financial objectives, such as business expansion, debt management, and investment. Financial Sales Representatives complete credit and loan documentation and submit credit and loan applications to branch or credit managers with recommendations for approval or rejection. Financial Sales Representatives also prepare statements on delinquent accounts and forward irreconcilable accounts for collector action and review and update credit and loan files.

### Working Conditions:

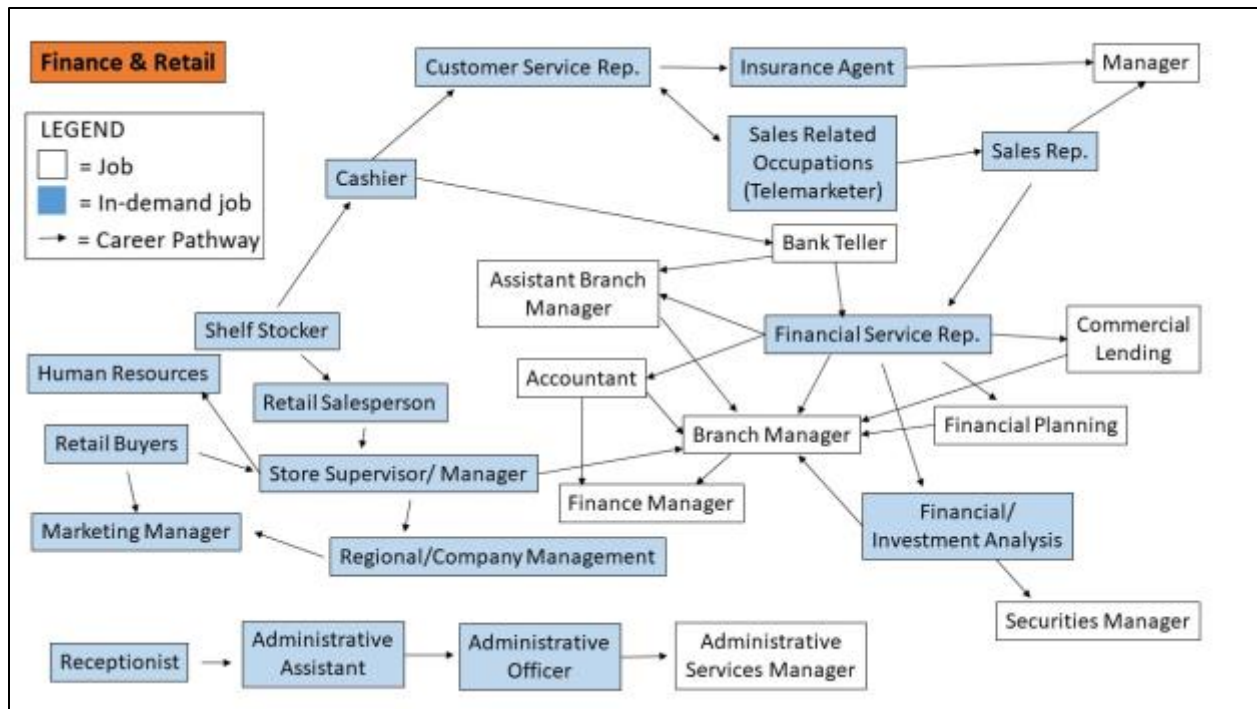
Work in this occupation is typically performed in a structured environment, such as an office.

### Career Pathways:

The specific type of Financial Sales Representative an individual becomes is typically based on their education and training specializations. Many specialize in particular products, such as commodities. Progression to higher levels of financial planning and wealth management is possible with experience. Progression to credit and loan management positions is also possible with experience.

Most Financial Sales Representatives work in banks, credit unions, trust companies, and smaller financial institutions. Below are potential career pathways for Financial Sales Representatives:

- Credit Officer
- Debt Counsellor
- Financial Services Officer
- Financial Services Representative
- Loan Officer
- Mortgage Officer
- Personal Banker
- Sales Associate – Personal Banking
- Student Loans Officer



### Education and Training Pathways:

If you're interested in becoming a Financial Sales Representative, you can acquire training/education locally at any of the following institutions.

#### College Boreal:

#### **Business**

#### **Admission/Eligibility Requirements:**

- OSSD, ACE certificate, or its equivalent in another province, or adult student status
- 1 French credit: FRA4C, FRA4U, or equivalent
- 1 mathematics credit: MCR3U, MCF3M, MAP4C, MCT4C, or equivalent

**Academic Credential:** Ontario College Diploma

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 4 semesters

**Program Cycle:** Unknown

**Program Cost:** Unknown

**OSAP Eligible:** Unknown

**Location:** 7515 Forest Glade Drive, Windsor, N8T 3P5

For more information on this program, please visit:

<http://www.collegeboreal.ca/programmes/business/>

[St. Clair College:](#)

### **Business Administration – Finance**

#### **Admission/Eligibility Requirements:**

- OSSD with the majority of courses at the College (C), University (U), University/College (M), or Open (O) level, or;
- Mature Student Status

**Academic Credential:** Three Year - Ontario College Advanced Diploma

**Professional Certification:** Unknown

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 6 semesters

**Program Cycle:** Unknown

#### **Program Cost:**

- Year 1: \$3,941.61
- Year 2: \$3,781.0
- Year 3: \$3,804.05
- Total: \$11,526.71 (2017/18)

**OSAP Eligible:** Unknown

**Location:** 2000 Talbot Road West, Windsor, N9A 6S4

For more information on this program, please visit:

[http://www.stclaircollege.ca/programs/postsec/busadmin\\_finance/](http://www.stclaircollege.ca/programs/postsec/busadmin_finance/)

[University of Windsor:](#)

### **Business Administration**

#### **Admission Requirements:**

- Mean Admissions Average: 83%
- Minimum Admissions Average: 73% (without co-op and 78% (with co-op) ENG4U and one Grade 12U math with a mark of at least 70%

- For second-year Odette School students: minimum of 75% average (Students must obtain major average of 70%+ and cumulative average of 65%+, and successfully complete three paid work terms to remain in Co-op program) (Only one outstanding grade of lower than 50% is permitted)

**Academic Credential:** Degree - Bachelor of Commerce

**Professional Certification:** Opportunity for Information Systems Concentration and Certificate

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 4 years

**Program Cycle:** Intake for Fall, Winter, Summer

**Program Cost:** \*\$10867.86

**OSAP Eligible:** Yes

**Location:** 401 Sunset Avenue, Windsor, N9B 3P4

For more information on this program, please visit:

<http://odette.uwindsor.ca/programs-available>

## **Business Administration and Computer Science**

### **Admission Requirements:**

- Mean Admissions Average: 83%
- Minimum Admissions Average: 73% (without co-op and 78% (with co-op) ENG4U and one Grade 12U math with a mark of at least 70%
- For second-year Odette School students: minimum of 75% average
- (Students must obtain major average of 70%+ and cumulative average of 65%+, and successfully complete three paid work terms to remain in Co-op program) (Only one outstanding grade of lower than 50% is permitted)

**Academic Credential:** Degree - Bachelor of Commerce

**Professional Certification:** Opportunity to Concentrate and receive Certificate in Marketing, Human Resources Management, Finance, Accounting, and Information Systems

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 4 years

**Program Cycle:** Intake for Fall, Winter, Summer

**Program Cost:** \*\$10867.86

**OSAP Eligible:** Yes

**Location:** 401 Sunset Avenue, Windsor, N9B 3P4

For more information on this program, please visit:

<http://www.uwindsor.ca/studentrecruitment/333/business-administration-honours-and-computer-science-optional-co-op>

## **Business Administration and Economics**

### **Admission Requirements:**

- Mean Admissions Average: 83%
- Minimum Admissions Average: 73% (without co-op and 78% (with co-op) ENG4U and one Grade 12U math with a mark of at least 70%
- For second-year Odette School students: minimum of 75% average
- (Students must obtain major average of 70%+ and cumulative average of 65%+, and successfully complete three paid work terms to remain in Co-op program) (Only one outstanding grade of lower than 50% is permitted)

**Academic Credential:** Degree - Bachelor of Commerce

**Professional Certification:** Opportunity to Concentrate and receive Certificate in Marketing, Human Resources Management, Finance, Accounting, and Information Systems

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 4 years

**Program Cycle:** Intake for Fall, Winter, Summer

**Program Cost:** \*\$10867.86

**OSAP Eligible:** Yes

**Location:** 401 Sunset Avenue, Windsor, N9B 3P4

For more information on this program, please visit:

<http://odette.uwindsor.ca/programs-available>

## **Master of Business Administration**

### **Admission Requirements:**

- Four-year, qualifying undergraduate degree
- Minimum average GPA of 70% (calculated based on last 20 courses of qualifying degree)
- Minimum Graduate Management Admission Test (GMAT) score of 550, a verbal score of 26, and a quantitative score of 30
- Two letters of reference required
- Resume and letter of intent required
- Applicant subject to qualifying interview

**Academic Credential:** Degree (MBA)

**Professional Certification:** Unknown

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 14 months

**Program Cycle:** Unknown

**Program Cost:** \*\$5886.88/semester

**OSAP Eligible:** Yes

**Location:** 401 Sunset Avenue, Windsor, N9B 3P4

For more information on this program, please visit:

<http://www.uwindsor.ca/mba/>

## Economics

### Admission Requirements:

- Mean Admissions Average: 80%
- Minimum Admissions Average: 70%
- ENG4U, MHF4U are required. MCV4U and MDM4U are strongly recommended for BSc Honours Economics. 70% Science/Math average BSc Economics.

**Academic Credential:** Degree (BSc)

**Professional Certification:** unknown

**Attendance:** In-person

**Full-time or Part-time:** Full-time

**Program Length:** 4 years

**Program Cycle:** Intake for Fall, Winter, Summer

**Program Cost:** \*\$8021.26

**OSAP Eligible:** Yes

**Location:** 401 Sunset Avenue, Windsor, N9B 3P4

For more information on this program, please visit:

<http://www1.uwindsor.ca/economics/>

***Disclaimer:** The educational institution reserves the right to change information without notice, and may result in discrepancies between their information and the information presented above. If any errors are found, please report them to [info@workforcewindsorsex.com](mailto:info@workforcewindsorsex.com).*