

**For university graduates with degrees in administration or related field.****Type of training**

Training in a classroom setting by seasoned instructors, with periods of training in the workplace (a mentor will facilitate your integration into the workplace and learning activities). Leads to a Desjardins certification.

**Duration:** 17 weeks

**Goals**

- Prepare you to meet the challenges of the position.
- Develop your relational and sales skills.

**Prerequisites:** Obtain a Mutual Funds Representative license. (An intensive training session and classroom exam are included in the program.)

**Topics covered**

- Regular transactions-related products and services
- Term savings
- Estates
- Specialized savings and investments
- Consumer credit
- Mortgages
- Business strategy
- Compliance

**At the end of the training you will be able to:**

- meet member's financing needs, particularly with regards to mortgages
- advise members on the best strategies to help their savings grow
- analyze loan applications to be able to recommend or reject them
- perform prospecting activities
- identify business opportunities
- solicit members and sell financial products and services

**The interview**

Once you've submitted your application and reached the pre-selection stage, you may be called in for an interview. A second interview and psychometric tests may be required before confirming your admission to the training program.

The interview is to assess that you have the level of relational skills required for the position. The goal of the interview is to evaluate:

- your potential aptitude for a sales, advisory services and customer service-related position
- your motivation to hold the position and commit to the training program
- your profile with regards to what is being sought for the position

No knowledge is assessed during the evaluation process.

No experience in the area of financial services is required to take part in the training program.