ABOUT US

CI Private Counsel, a subsidiary of CI Financial, provides a broad range of portfolio and wealth management solutions exclusively through a national network of financial advisors affiliated with CI Assante Wealth Management. We operate under the brand CI Assante Private Client. CI Private Counsel is part of CI Financial, a diverse group of financial services firms with approximately $240.6 billion in total assets at March 31, 2021. For more information, please visit www.assante.com.

POSITION:	**Accountant – Wealth & Financial Planning Consultant**
INTERNAL TITLE:	**Regional Wealth Planner**
LOCATION:	Toronto
STATUS:	Full-time

JOB OVERVIEW

We are currently recruiting for an accountant to join our Wealth Planning team. The focus of this senior planning role is to work with our field service team as well as our Financial Advisors and our mutual clients, facilitating the production of various Wealth Planning reports (Financial Analysis, Risk Management, Tax and Financial Strategies, and Estate Planning) through our centralized Wealth Planning Group. Those who may find this role appealing would include an accountant who prefers planning over compliance.

Recognizing the complex and diverse needs of our clients, comprised largely of successful business owners and high net worth families; you will take a holistic approach to identify client needs and proactive planning opportunities.

This role provides the opportunity to collaborate with members of both our regional and national wealth planning team and professionals from some of Canada's top legal and accounting firms, your passion is supporting advisors in delivering a truly differentiated experience their clients will value and talk about. The individual works as a part of a team consisting of estate planning specialists, tax specialists, financial planners, investment counselors, and insurance specialists.

WHAT YOU WILL DO

- Build and strengthen relationships with advisors to ensure their satisfaction with the Wealth Planning services provided
- Meet with advisors and clients/prospects to assess the level of wealth planning support appropriate for each situation
- Meet with and collect data from advisors, clients and client's accountants and lawyers for the preparation of various wealth planning reports. Many clients who receive Wealth Planning support are successful business owners / high net worth families with in excess of $1 million invested with us
- Organize the data, complete wealth planning questionnaires and work with our central Wealth Planning Group, where the reports are prepared. A complex report consisting of several modules may be more than 100 pages in length with numerous recommendations. Present the report to the client and advisor, typically over a few meetings, along with the support of the tax accountants and lawyers on the field team on more complex files.
- Manage and track file process and implementation by accounting and legal firms
- From time to time, may develop and deliver educational seminars to advisors related to Wealth Planning as well as respond to various questions on wealth planning strategies

WHAT YOU WILL BRING

- University degree in business or related discipline, or equivalent experience is required
- An accounting designation or a CFP® designation is required
- TEP designation would be an asset
- Experience in a client or advisor facing role in a Financial Services or a Professional Services firm
- Experience with planning for business owners is an asset
- Knowledge of wealth planning concepts – financial analysis, insurance needs analysis, tax and financial strategies, and estate planning is an asset
- Strong verbal and written communication
- Strong organizational, analytical skills and attention to details
- Demonstrated excellence in client service
- Ability to understand and interpret financial/investment issues related to financial planning, tax and estate planning as well as financial statements and tax returns
- Ability to work independently and as part of a national team
- Experience with Microsoft Office
- Experience with Financial Planning Software is an asset

WORKING CONDITIONS

- Must be able to travel – there is the possibility of up to 30% travel around Ontario in the role with the occasional overnight

WHAT YOU CAN EXPECT FROM US

Our dedication to the Employee Experience at CI is aimed at supporting, empowering and inspiring our talented team through:

- Recognition & Compensation
- Training & Development
- Health & Well-being
- Communication & Feedback

If you are a passionate, committed and dynamic individual, please submit your resume in confidence by clicking "**Apply**".

Only qualified candidates selected for an interview will be contacted.

CI Financial Corp. and all of our affiliates ("CI") are committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at accessible.recruitment@ci.com, or call 416-681-4747. **If you are contacted by CI** regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.