Financial Advisor Job Posting

An unusual opportunity

Would you like to monetize your business while still owning it? Would you like to manage a block of assets without having to purchase it?

To good to be true? No, but it is an unusual opportunity!

A large, experienced national private wealth management firm has a large block of business in Southwestern Ontario to assign to a qualified advisor. You must have your CFP or be working towards obtaining it. You will be expected to nurture and grow the business.
If you already have a block of clientele, compensation will be provided for you to bring that business over.

You may choose to bring your own team with you and to remain in your own office space. You can also rely on the existing support team for transitioning your assets over quickly and efficiently, as well as on-going administration and top-notch customer service.

Joining this national private wealth management firm means that you will appreciate their modern advisor platform, including:

- Extremely competitive pricing
- World-class global investment platform
- Unbundled fees
- Strong planning focus

Who we are

We provide a full range of financial products and services to 500+ families, entrepreneurs, professionals and business owners. We have been in practice for over 40 years. A core delivery of the firm is providing and updating financial plans. If you join us, your primary focus as a client-facing advisor is to service clients assigned, expand the business, and enhance client services.

Responsibilities include

- Financial Planning
- Servicing the clientele
- Prospecting and attracting new clients
- Providing clients with solutions to their needs

Please note that The Personal Coach is assisting a client with this opportunity. If we have peaked your interest please apply to kim@thepersonalcoach.ca. We are looking forward to getting to know you.

55 Northfield Drive East, Suite 312, Waterloo, ON N2K 3T6
T 519.576.2262 ext. 2 juli@thepersonalcoach.ca