Job Posting – INSCH Wealth Management – Associate Advisor
July 2021

INSCH Wealth Management has been servicing clients for almost 30 years – and we continue to grow. We are looking to expand our team by adding an Associate Advisor to service and grow the existing client base. The primary focus of the Associate Advisor is to build portfolios, create retirement plans and provide value and high-quality investment advice. Our clientele includes people in Newcastle, Bowmanville, Clarington, Peterborough, Oshawa, Port Hope and Pickering.

Joining INSCH Wealth Management means that you will appreciate the following:

- An administrative support infrastructure already in place
- Upwards of 300 families to work with
- Compensation of salary plus bonus, noting that this could lead to more independence down the road
- Having investment business with Worldsource Financial Management Inc.
- Working with a collaborative, fun team who truly enjoy coming to work
- An office in a spectacular old brick building (1860's) as well as parking
- The Newcastle, ON location of the firm

The successful candidate for this career will have:

- Canadian Securities Course (CSC) License (preferred) or the MFDA's CIFC
- LLQP Life license (an asset)
- CFP designation or working towards obtaining it (an asset)
- Documented prior successes with selling life insurance and investments
- A desire to help people plan for the future and the ability to motivate them to make decisions and act (sales ability)
- Internal drive, lots of energy and an entrepreneurial spirit
- Working knowledge of Razor and PlanPlus financial planning software (or equivalent) as well as MorningStar

Key Responsibilities include:

Servicing existing clientele

- Service existing investment portfolios and make on-going recommendations to them
- Review and respond to clients changing needs and financial circumstances
- Provide exceptional relationship attention and service to all clients

Financial Planning

- Conduct in-depth reviews of clients' financial circumstances, current situation and future goals, with an emphasis on retirement projections
- Explain issues and concepts related to the overall financial planning process
- Input client data in financial planning software and identify problem areas and opportunities
- Prepare potential solutions and motivate prospect/client to take action to implement solutions

Product Solutions

- Follow through on the Financial Planning by implementation of product solutions
- Recommend and explain different types of product solutions to clients and guide them to choose the most appropriate for their situation
- Investments – analyze and develop portfolios, prepare reviews, track top funds using
- Insurance – service and sell life, critical illness, disability and segregated funds
- Maintain proper documentation following preset guidelines/compliance

If you are interested in continuing your financial services career with INSCH Wealth Management, please apply with a cover letter to kim@thepersonalcoach.ca
by August 3, 2021. We are looking forward to getting to know you.