GRK Wealth Management
Associate Advisor Job Posting

Description of company and role:

Good Redden Klosler is a fully integrated team of professional experts with extensive knowledge in accounting, advisory and wealth management services. We take pride in offering our owner-manager entrepreneurial clients comprehensive financial solutions tailored to their unique needs. It all begins with a personalized financial plan. Then, utilizing our wide array of in-house services, including investment and insurance solutions, we ensure our clients' financial goals are met with precision and care.

We are seeking an Associate Advisor to join our team. The Associate Advisor's primary responsibility will be to deliver top-notch advice, products, and financial planning services in support of our Certified Financial Planners and directly with our clientele. This involves managing client relationships, ensuring effective communication throughout the crafting of the financial plan and implementation of solutions supporting our clients' financial goals.

Every day, we collaborate closely with accountants, which leads to superior outcomes for our clients. It's worth noting that this career opportunity may hold significant appeal for individuals currently working in the accounting field.

The Associate Advisor will be based on-site, splitting their time between our Tillsonburg and Simcoe offices. For further insights into our firm and the services we offer, please visit our website http://www.goodcas.com/

The successful candidate for this career will:

- Have internal drive, lots of energy and an entrepreneurial spirit
- Be social, relationship oriented and interested in community
- Have 3 years' experience providing investment and/or life, disability, and critical illness insurance solutions
- Have the LLQP license (will be required within 2 years if not currently held)
- Have the QAFP, CFP, CIM or CPA designation or be working towards obtaining one or more
- Have accounting and/or taxation experience (an asset)
- Have a desire to help people plan for the future and the ability to motivate them to make decisions and take action
- Have a professional presence and appearance
- Possess the ability to think critically and evaluate all the data available to help clients meet their goals
- Possess strong spoken and written communication skills in the English language
- Have excellent technology skills including experience with Salesforce
- Have a desire to be ingrained in the business and to potentially be part of a longer-term transition/succession

Key Responsibilities Include:

Financial Planning

- Conduct in-depth reviews of clients' financial circumstances, current situation, and future goals
- 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

Implement 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 – refer and support client relationships with our partner TriCert Investment Counsel
- Insurance – life, critical illness, disability, and segregated funds

Service Clientele
- Review and respond to clients changing needs and financial circumstances
- Co-ordination, preparation and completion of client meeting agenda, quotes, presentations, spreadsheets, statements, forms and materials for client meetings and reviews
- Process new insurance applications and service existing insurance policies
- Provide administration related to client portfolios with our partner TriCert Investment Counsel
- Provide exceptional relationship attention and service to all clients
- Keep Salesforce up to date with meeting notes, phone conversations, actions taken, etc.

Compensation
An approximate salary range is $60,000 and $100,000 depending on experience, licensing, and designations.

Next Step
Please respond with a cover letter expressing your interest in joining this dynamic financial planning team. Please note that Kim Poulin of The Personal Coach is assisting us with this hire.