

BULLWEALTH CLIENT STRATEGIST - HAMILTON

WHO IS BULLWEALTH?

BULLWEALTH was founded in 2000 as an integrated wealth advisory and consulting firm with a global perspective.

BULLWEALTH invests our time to share our insights, so together with our high net-worth and not-for-profit clients, we can make the most informed decisions that align with their overall financial goals. We are independent! Our independence means we are conflict-free to advise our clients on their overall financial goals.

Our core competencies are to develop sound tax strategies, build portfolios with customized asset allocation, complete extensive due diligence on investment managers, publish comprehensive quarterly reports, and deliver superior independent and strategic advice via BULLWEALTH's integrated tax and investment solutions.

Our culture and values are core to our team! We are ***Team-Focused*** – we collaborate with team members on our actions and decisions by interacting and working effectively together; we are ***Accountable*** – we accept responsibility for our actions and decisions by having a full understanding of what is required of us; and ***Growth*** is our mindset that allows for continuous learning (both professionally and personally) to achieve our best selves.

We are looking for a new team member in our Hamilton office who strives to meet our values and become part of our growing business!

CLIENT STRATEGIST RESPONSIBILITIES:

- Develop client relationships by advising clients on their overall wealth planning and investment objectives;
- Analyze and assess diverse issues and advise clients in developing an integrated solution for cash flow planning, tax planning, estate planning, retirement planning and investment planning;
 - Review cash flow requirements for all clients, at least annually, by assessing future lifestyle and other needs;
 - Review Tax-Loss Selling opportunities, annually, with BULLWEALTH's Tax & Accounting Group, to determine a client's optimal tax planning decisions;
 - Develop integrated strategies to assess the optimal retirement and tax plan with BULLWEALTH's Tax & Accounting Group;
 - Educate clients on tax, estate, retirement and investment decisions;

- Assist in the preparation, construction and publishing of monthly Flash Reports, then discuss results with clients;
- Use BULLWEALTH's Risk Attitude Questionnaire to build customized asset allocations and apply to a client's investment portfolio;
- Participate in quarterly due diligence reviews with new and existing investment managers in association with BULLWEALTH's Research & Investment Group;
- Analyze client's investment manager and investment portfolio performance and discuss with client;
- Develop Statement of Investment Policies and other relevant documents (Investment Advisory Agreements and/or Engagement Agreements) which demonstrate an understanding of a client's overall financial and investment objectives;
- Be a non-voting member of BULLWEALTH's investment committee and asset allocation committee meetings; and
- Travel to BULLWEALTH's Toronto offices to interact with other Client Strategists and Portfolio Managers, and the firm's Research & Investment Group; and
- Develop new and existing Center of Influence contacts;

KNOWLEDGE & EXPERIENCE:

- Wealth Planning – Develop processes around wealth planning to consider cash flow planning, tax planning, estate planning, retirement planning or investment planning;
- Tax Planning – Experience working with all aspects of a client's tax plan to ensure it is integrated with the investment portfolio to minimize their long-term tax liabilities;
- Investment Managers – Research or oversee due diligence of investment manager's pooled funds or separately managed accounts, *not picking stocks and bonds as your primary focus*;
- Asset Allocation – Develop investment portfolios using different types of asset allocation processes that may include questionnaires or optimization or other forms;
- Asset Classes – Familiarity with both traditional and alternative asset classes;
- Experience with all Microsoft Tools – Knowledge with Excel for Asset Allocation Reports and Flash Reports, knowledge with PowerPoint for prospect presentations and other presentations to clients, and knowledge with Word for Client Reporting and written communication with clients;
- Written and Communication Skills – Good client communication skills to develop rapport and long-term relationships, while also being able to write commentaries;
- Rebalancing – Rebalance client portfolios with a discipline or understanding to ensure a client's asset allocation aligns with its targets, while considering tax planning and tax liabilities of gains/interest income; and
- Understanding Taxable and Registered Portfolios – Knowledge of RSP's, TFSA's, RRIF's, holding companies and other account types.

STRATEGIST QUALIFICATIONS:

- Bachelor's degree in finance, accounting, economics or related field;
- CFP or QAFP Certification;
- Completion of CSC and/or CIM (or in the process of completing CIM);

- 5+ years of experience as either a financial planner or wealth planner or investment advisor;
- Strong analytical skills and attention to details; and
- Strong communication skills, both written and verbal.