Investment Advisor

Unique Opportunity!

Our client, a pioneer in the investment dealer community in Canada, has been providing independent investment advice to retail investors for 35 years. Our client believes in the independence of an advisor's practice with a dealer platform with no commission grid, no sales targets and no proprietary products. Their mission is to provide advisors with everything they need to provide customized financial solutions for their clients.

Our client is looking for an Investment Advisor who is planning on retiring or reducing their work hours in the next few years to join his practice. This is an opportunity to join a wonderful firm while going into a smoother retirement transition.

Offer:

- This offer will form a relationship with someone you can trust, boost retirement, freedom, flexibility, caring of clients and an opportunity transfer over time/sell your book for valuation and make retirement money
- Work Remote
- Supportive Team
- E/O insurance expenses will be covered. Licensing fees covered. Firm IA fees will be covered
- The advisor will have the liberty to be involved with the care of the clients as much or as little as the advisor desires
- The ability to maintain a health insurance benefit plan for several years through retirement
- Other benefits/perks to be discussed

Requirements:

- IIROC license is critical. Portfolio Manager/Discretionary license is an important asset.

What if you can create a structure that minimizes risk and gets you more for your practice?

Worth 10 minutes to learn more?

Please contact:

Natalie Goldring, CHRL, RPR, CMWA
Natalie.a.goldring@gmail.com