FOCUS
ASSET MANAGEMENT

Vice President, Wealth Planning

Focus is seeking a senior wealth planning professional to join our client service team. The incumbent will design and implement a comprehensive wealth planning services offering and provide high value financial planning and specialized advice to HNW and UHNW clients and prospects.

As a senior member of our team, the individual will also help to shape our client service/business development strategy.

The opportunity

- Lead Focus' development of a comprehensive wealth planning services offering for HNW and UHNW clients. Set the firm's strategy in this area, determining the resources and work products required to deliver a distinctive experience to clients and prospects.
- Prepare comprehensive financial plans, providing client-specific insight in areas such as financial planning, insurance, wills and estates, and tax.
- Simplify sophisticated wealth planning questions to support Client Portfolio Managers.
- Deliver presentations to end clients, in concert with Client Portfolio Managers.
- Create thought leadership content (articles, videos) to bolster Focus' communications to clients and prospects.
- Provide ongoing coaching and mentorship to future Wealth Planning team members.

Candidate capabilities and experience

- 10+ years of relevant experience in financial planning or a related discipline (e.g. tax, estate planning, insurance).
- CFP designation, with a preference to those with additional industry credentials (e.g. CPA, TEP, LLB, CLU).
- Complex financial planning experience, as well as experience interacting with HNW and UHNW individuals as a subject matter expert.
- A combination of strong technical expertise, presentation skills and writing ability.
- Initiative and an entrepreneurial spirit, with a willingness to function as a "player/coach" – both leading and executing on a wealth planning strategy.

Focus Asset Management

Focus is an established private investment management firm catering to high-net worth individuals, families and foundations. We help our clients protect, grow and manage their wealth in a manner that reflects, and is consistent with, their unique circumstances and objectives. In addition to investment management solution, Focus also provides broader wealth management services including estate planning, tax planning, philanthropic, and legacy considerations.

The Focus team is comprised of dynamic individuals with unique backgrounds and skills. The culture is entrepreneurial, results driven, and focused on creating a professional environment that is founded on integrity and trust.

To apply, please send you resume to James Stellick james.stellick@focusasset.ca