Job description –

Job title: Associate Advisor – Independent Financial Services

As Canada Life, we're helping a top independent advisor find a new partner to join their leading financial advisory firm. This is an opportunity to make a difference in your own life and in the life of clients. A financial services background is not required; what is required is a commitment to leaving the world a better place and helping others to do so as well.

The firm we're assisting is committed to providing opportunities for members of traditionally under-represented and marginalized groups in financial services and will strongly consider how we can support and uplift people from these groups in reviewing applications for this role. Women-identified and non-binary persons, those who are immigrants or racialized, those who are members of the LGBTQ2S+ community, and/or experience any other oppressions or barriers are encouraged to apply.

You are:

- A successful professional in a customer-facing industry
- Passionate about making a difference in your community
- Motivated and a self-starter
- Entrepreneurial in spirit
- Analytical and a problem-solver
- A great listener who wants to hear other's stories of how they got to where they are and cares about your clients and industry
- Committed to helping people leave a legacy, whether that's through responsible investing, planned giving, charitable bequests, and more
- Wanting to take your career to the next level by joining a firm where you have the potential to take an ownership or leadership stake
- Confident that you can help people achieve their goals while also achieving your own
- Committed to championing diversity

Where you may be coming from:

- Bank advisor looking for greater independence, ownership of your own client relationships, or access to more socially responsible investing products
- Independent investment advisor or wholesaler seeking to partner with a leading firm to help achieve your own firm growth goals and potentially gain equity in a successful practice
- Wills/Estates lawyer looking for a break from traditional firms while still helping people make legacy and estate plans that will ensure their impact lives on
- Accountant looking to do full estate (insurance and investment) tax planning for clients who want to make a difference with their money
- Non-profit/foundation fundraising executive looking to develop life-long relationships with clients who share a desire to leave the world a better place
- Entrepreneur looking for your next challenge to build a successful practice with lifelong relationships

What you'll do:

- Alongside the firm principal help high net-worth clients implement investment and insurance strategies, often using socially responsible investing funds
- Develop relationships with clients to uncover their financial planning goals and help them implement the strategies that will help them to achieve those goals
- Regularly review and refine clients' financial plans

The opportunity:

- For the right person this is a fantastic opportunity to get into a partnership with a leading firm with the opportunity to build equity in the firm and succeed the principal and take over their clients over time
- Highly competitive base salary + commission to be negotiated to suit your goals & the firm goals

We will assist a successful candidate in achieving their licenses to sell insurance and/or mutual funds if required. A CFP® or other planning designation appropriate to your existing industry would be considered an asset but is not required.

This is an incredible opportunity to have a career that is both financially and personally rewarding. The potential to take an equity stake in the practice is exciting. You will be joining an already successful firm with very loyal clients – the types of clients that you're excited to see their number when they call. You'll see the difference you make to your clients and in the community and know you've made a great career transition.

If this sounds like an opportunity you would like to explore, please send us an expression of interest outlining why you are excited about this post to advisorcareers@canadalife.com with the subject matter "HAL2022-1".