

## **ASSOCIATE FINANCIAL ADVISOR**

Private Wealth Management Associate Advisor – Bobcaygeon, Ontario

Seeking an Associate Consultant to join McInroy and Associates Private Wealth advisory team in Bobcaygeon and Haliburton, Ontario to help grow the practice. You will actively support lead advisors in identifying new business opportunities, growing the assets of our clients, and building relationships with key stakeholders. You must be self-motivated and disciplined, with an entrepreneurial spirit and a passion for client service and business development.

### **RESPONSIBILITIES:**

- Support all financial planning, marketing activities and business development
- Identify new business opportunities and develop new client relationships from external prospecting and introductions generated from centers of influence
- Meet directly with existing clients and prospective clients to execute strategic concepts and further the client relationship
- Review client accounts, execute trade orders, maintain account lists, track client documentation, and explain product, services, and strategies to clients directly
- Complete income tax returns using Can Tax Software and in the process of doing so identify opportunities for in-depth financial planning strategies to be implement or opportunities to gather assets

### **THE BENEFITS**

- Robust compensation and benefit package which includes a base compensation of \$60,000 - \$80,000
- Entrepreneurial culture that promises personal growth and development in the high-net-worth market
- Opportunity to build a rewarding career with a well-established financial services organization.

### **REQUIREMENTS**

- Three (3) years of experience in the financial services industry
- MFDA license upon starting position
- Life License Qualification Program (LLQP) or willing to obtain
- QAFP or CFP® preferred but not required to start
- Demonstrated ability to analyze, synthesize, and summarize data for executive briefing
- Exceptional organizational skills, attention to detail, follow up, ability to work independently, and priority management skills
- Demonstrated self-starter and ability to manage volume, variety, and complexity
- Exceptional collaboration & teamwork skills
- A positive and confident team player who clearly understands and contributes to the goals and needs of the team as a whole
- Superior client relationship management skills and professionalism

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We thank all applicants, however, only those under consideration will be contacted.