Senior Wealth Planner

Location: This position may be located in any of our offices in Manitoba, Saskatchewan, Alberta, or British Columbia.

Role Description:

Reporting to the Senior Vice-President, Advanced Wealth Planning the Senior Wealth Planner is responsible for the development, execution and maintenance of comprehensive wealth plans and goals-based reporting for WA clients.

The SWP will play an integral role in business development and will provide value-added services to WA Advisory teams and their clients.

As the Senior Wealth Planner, you will:

- Meet with existing and potential clients. Help clients to articulate and identify their short and long-term goals
- Proactively maintain current and in-depth knowledge of all areas of the wealth planning process, including financial, investment, education, insurance and risk management, retirement, tax and wealth transfer planning
- Drive the WA wealth planning process and continuously look for ways to improve and enhance the WA client experience
    - Prepare an introduction package with an engagement letter, document request and Wealth Questionnaire
    - Identify and enter client information into planning software and generate financial and other wealth plan aspects
    - Manage the various wealth planning deliverables through the process
    - Review wealth plan deliverables and goals-based reporting with Advisory teams and their clients
    - Identify outside assets and referral/Centers of Influence opportunities
- Develop and maintain relationships with Centers of Influence
- Collaborate and work closely with clients' other professional advisors in the spirit of delivering a holistic experience
- Recognize and foster intergenerational wealth management amongst WA Advisory teams and their clients
- Work in collaboration with Advanced Wealth Planning peers in training and education initiatives with WA Advisory teams
- Develop and present seminars for WA Advisory teams and their clients on a variety of wealth planning topics
- Perform other duties as assigned.

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Your education and qualifications include:

- Degree or Diploma in business administration, accounting, finance, or similar field of study
- Minimum of 3 years' experience in a wealth planning role
- Professional designation such as CFP, PFP, TEP or CLU.
- Income Tax and Insurance background a preference
- Strong organizational, analytical skills and attention to detail
- Ability to work independently and as part of a national team whose members have varied backgrounds and industry experience
- Experience in working with UHNW, business owners and foreign assets
- Exhibit a high level of professionalism that allows clients to feel comfortable discussing personal, confidential information
- An entrepreneurial spirit to participate in WA continued growth, and a desire to continuously exceed client expectations

Conditions of Employment:

- Must be legally eligible to work in Canada.
- A background check, satisfactory to the employer, may be required of the successful applicant prior to commencing employment.

Wellington-Altus Private Wealth is strongly committed to equity and diversity within its community and welcomes applications from women, racialized persons, Indigenous peoples, persons with disabilities, and persons of all sexual orientations and genders. All qualified individuals who would contribute to the further diversification of our organization are encouraged to apply.

If you require accommodation for the recruitment process, please let us know at the point of application.