Financial Advisor Job Posting
September 14, 2021

An unusual opportunity

We have an unusual opportunity where a large, experienced national private wealth management firm has a $58 million block of business made up of 125 clients in London to assign to a qualified financial advisor.

You must have your CFP or be working towards obtaining it. You will be expected to nurture and grow the business. You can rely on the existing support team for on-going administration and top-notch customer service.

Joining this firm means that you will appreciate their modern advisor platform, including:

- Extremely competitive pricing
- World-class global investment platform
- Unbundled fees
- Strong planning focus

Who we are

The Private Wealth Management firm is comprised of experienced and knowledgeable professionals who build comprehensive financial plans using sophisticated strategies designed to meet the complex needs of high net worth families.

We provide a full range of financial products and services to 500+ families, entrepreneurs, professionals and business owners. We have been in practice for over 40 years. A core delivery of the firm is providing and updating financial plans. If you join us, your primary focus as a client-facing advisor in London, Ontario, is to service clients assigned, expand the business, and enhance client services.

Responsibilities include

- Financial Planning
- Servicing the clientele
- Prospecting and attracting new clients
- Providing clients with solutions to their needs

Please note that The Personal Coach is assisting one of our advisor client teams with this opportunity. If we have peaked your interest please apply to kim@thepersonalcoach.ca. We are looking forward to getting to know you.

55 Northfield Drive East, Suite 312, Waterloo, ON N2K 3T6
kim@thepersonalcoach.ca