

# Job Details

## Description

### Wealth Advisor

#### Thrive Wealth Strategies

Thrive Wealth Strategies is a wealth management firm serving members of credit unions and their communities. Financial advice and planning are core to what we provide for clients, including investment advice, retirement savings, income planning, estate, and protection advice. Our employees are team-oriented individuals and support a relationship-based environment. [Learn more about our diverse team across Saskatchewan.](#)

#### The bigger picture:

We're looking for a Wealth Advisor to join our Thrive Wealth Strategies team in Regina. If you are a self-starter who has what it takes to become highly successful, earn an above average income and build a long-term career, then apply for this role today. You act with professionalism and integrity at all times and take pride in doing what is right for your clients.

#### How you'll spend your time:

- Provide expert advice and custom-made solutions to clients with complex financial needs
- Work with our credit union partners in a lead-generating environment
- Develop business through your centers of influence and referral relationships
- Improve the financial wellbeing of your clients through professional financial planning and wealth management expertise
- Proactively identify opportunities to make introductions to experts on our team including the Wealth Protection Specialists

#### The way people describe you

- An individual who acts with professionalism and integrity
- You take pride in doing what is right for your clients
- An effective networker who actively seeks new client relationships and opportunities

#### The experience you bring:

- 4+ years of investment and financial service experience
- A proven track record of delivering sales results
- IIROC licensable and able to obtain a level II life license
- Financial planning designations (CFP®/PFP®/CIM®) are considered an asset

#### What you get in return:

- **Compensation**– Competitive commission model and total rewards package.
- **Work/Life Fit**– You won't be chained to your desk, we trust you to manage your own day-to-day schedule. In addition to regular vacation time, we offer Thrive-Time (10 days per year), which allows you to disconnect from work for smaller periods throughout the year.
- **Wellness & Benefits**– Your choice of flexible or comprehensive package. Annual \$200 towards wellness activities per year.
- **Pension**– 7% matching to our CSS Pension Plan
- **Learning & Development (L&D)**– We want to see you succeed and build your career! Annual training/education related to your learning & development plan will be supported through covering costs and paid time off. We also offer a variety of networking and mentorship opportunities.
- **Credit Union Network**- We are the wealth management company of our credit union owners, which means we have the exciting opportunity to partner with our credit unions to offer wealth management to credit union members.
- **Operational Costs**- Thrive covers the operational cost (computers, office space/supplies, CRMs, etc.) of doing business so our team can focus on building relationships with clients and help them reach their wealth goals.

Does this sound like you? Please apply through our website. But act fast, this opportunity closes on July 31, 2021. All responses are appreciated, however only those invited for an interview will be contacted.

Looking for more details? Contact Heather at [heather.howland@thrivewealth.ca](mailto:heather.howland@thrivewealth.ca)

*Conexus and Cornerstone offers investment products through the Credential Asset Management Inc. and Credential Securities. Mutual funds are offered through Credential Asset Management Inc. Mutual fund and other securities are offered through Credential Securities, a division of Credential Qtrade Securities Inc. ®Credential Securities is a registered mark owned by Aviso Wealth Inc.*

*Thrive Wealth Strategies Ltd. is a subsidiary of Thrive Wealth Management Ltd., offering financial planning, life insurance and investments to members of credit unions and their communities.*