



KBH CHARTERED PROFESSIONAL ACCOUNTANTS (KBH) is a leading Alberta-based Accounting and Advisory firm with offices in Edmonton and Provost, Alberta. KBH offers a full range of services designed to meet the financial needs of our client's owner-managed businesses. This year, as we celebrate 40 years of being in business, we continue to value team growth & development, our clients, and our communities. Come and join our fast paced, energetic, and fun-filled environment!

Looking for the Right Fit? Then start with the Right Firm. KBH offers a challenging and rewarding experience, excellent compensation & benefits, Fridays off in the summer and much more.

We are currently looking for a permanent full time **Wealth Advisory Associate** for our Edmonton office. We are looking for someone who is motivated, outgoing, and positive with the ability to work independently and within a team environment. The successful candidate must have exceptional internal and external client service and relationship building skills. This individual will work alongside our Wealth Planner and report to our Wealth Advisory Partners. The role is perfect for a Finance student who is in or has just completed University or College.

Responsibilities for this role include:

- Maintaining a high level of confidentiality and discretion
- Onboarding of clients into KBH Wealth Advisory
- Assisting in the preparation of financial plans
- Providing professional support to clients and assisting them with their requirements
- Collaborating with and supporting the Wealth Advisory team
- Understanding and maintaining knowledge of financial software
- Liaising with members of the Independent Accountants' Investment Counsel (IAIC)
- Participating in firm initiatives and projects
- Scheduling and organizing internal and external meetings
- Attending client meetings when required
- Scanning and filing financial documentation
- Additional duties as required

The successful candidate must have:

- A University or College Bachelor's degree or be close to completing a degree
- Working towards or willing to enroll in the Certified Financial Planner (CFP) program
- Ability to handle confidential information in a professional manner
- Exceptional multi-tasking, organizational and time management skills
- Strong written and oral communication skills with excellent attention to detail
- Proficiency in MS Office with intermediate to advanced knowledge in MS Excel
- Knowledge of NaviPlan, Wellement or similar financial software would be an asset
- Experience working in a Professional Services environment would be a definite asset

If you are interested in our firm and this position, please email your cover letter, resume, transcripts, and salary expectations to Human Resources at hr@kbh.ca. Applications will be accepted until a suitable candidate is found.

Please visit our website at www.kbh.ca. No phone calls please. We thank all applicants for their interest, however only those candidates selected for an interview will be contacted.