Job Posting - Thomson Allison Financial Solutions
Financial Advisor, CIM

Who We Are

Thomson Allison Financial Solutions is a well-established independent financial advisory practice based in St. Jacobs, Ontario, serving a loyal community of families, professionals, and business owners. Our approach is values-driven, with a focus on building long-term trust while providing comprehensive financial planning and investment guidance. Our clients have enjoyed lasting success through the application of a long-term, disciplined investment approach (as opposed to timing the latest investment trends/fads).

We're looking for a CIM designated individual who will help maintain our commitment to clients and our investment approach today, with the potential to take on greater responsibility in the future.

What We Offer

- A stable client base with strong relationships.
- A healthy environment that supports client-first financial advice.
- Mentorship and transition support from the lead advisor to ensure continuity.
- Competitive compensation based on experience, licensing and designations.
- A modern office space with on-site parking.

What You Would Do

- Strengthen our team by assisting with existing clients and stepping into an advisory role with a subset of our company's clients.
- Serve and deepen existing client relationships with integrity, empathy, and professionalism.
- Anticipate client needs, provide annual and periodic client financial reviews, address concerns proactively, and ensure an exceptional client experience.
- Help people plan for the future and motivate them to make decisions and take action.
- Prepare files for client meetings and implement recommendations post client meetings.

Who You Are

You are a relationship-builder who loves to serve others. You see the potential for financial advice to be a calling, not just a career. You are seeking not only to serve clients but to take on a leadership role moving forward. Other qualifications in order of importance include:

- Chartered Investment Manager (CIM) designation (required)
- Strong alignment with values of integrity, service, and client-first advice.
- Proven ability to build trust and long-term client relationships.
- 5+ years of experience in finance, accounting, financial planning, wealth management, or investment advisory but this is not imperative.
- Desire to manage a segment of clients within six months to one year.
- Have a strong belief in the importance of financial planning.
- Have prior successes with managing client relationships in the financial services sector.
- Detail-oriented, organized, and able to manage multiple priorities efficiently.

- Possess the ability to think critically and evaluate all the data available to help clients meet their goals.
- Have internal drive, lots of energy and an entrepreneurial spirit.
- Possess strong spoken and written communication skills in English.
- Being a strong team player who enjoys assisting and leaning on your teammates.

How to Apply

If this opportunity excites you, please send your résumé and a brief cover letter outlining your career goals and why you believe you are the right fit for our company, to kim@thepersonalcoach.ca who is assisting us with this hiring opportunity.