Wealth Management Associate

Job Summary

Wealth Stewards Inc. is seeking a highly motivated recent graduate (or soon to graduate) to fill a new position as a Wealth Management Associate at our boutique wealth management firm. This individual will provide high-quality administrative and client service support to a team of financial advisors by maintaining efficient processes, ensuring accuracy in documentation, and delivering an exceptional client experience.

The successful candidate will thrive in a structured environment, take ownership of their responsibilities, and proactively find ways to improve workflows and maintain compliance standards.

This is an ideal opportunity to the get into the wealth management industry. Ours is a nimble team of dedicated financial professionals who work collaboratively and transparently towards a common goal – our clients' satisfaction and peace of mind. Every day, we seek to bring value to our clients and affect real change in their financial lives.

This job requires the candidate to initially work from the office during the probationary period of three months, then transition to a hybrid set-up thereafter. Our office is located in the west end of Toronto.

Key Responsibilities

Working alongside our Wealth Advisors, Portfolio Managers, and back-office teams, the Wealth Management Associate will:

- Support both client service and operational functions.
- Liaise with clients to coordinate meeting scheduling, document collection, and general inquiries.
- Prepare client meeting materials, ensure required documentation is available, and organize follow-up actions.
- Process account opening, maintenance, and transfer paperwork under the guidance of a registered individual.
- Maintain accurate and detailed client information within the CRM system and ensure documentation completeness.
- Prepare and send standard client communications, letters, and administrative follow-ups.
- Support compliance requirements by maintaining organized client files, assisting with document retention, and helping prepare for audits.
- Track pending transactions, account transfers, and outstanding documentation to ensure timely completion.
- Coordinate with custodians, fund companies, and internal back-office teams on administrative account matters (e.g., address changes, beneficiary updates).
- Manage team calendars, coordinate internal meetings, and support overall workflow efficiency.
- Generate reports or data exports from internal systems for advisor review.
- Contribute to internal projects, operational improvements, and compliance initiatives as needed.

Every day, you demonstrate strong attention to detail and exhibit an excellent work ethic. At Wealth Stewards we encourage questions and recommendations for improvement from you and all other team members. We believe that wearing multiple hats and cross team collaboration is essential to excelling in a small business culture.

You will report to the Office Manager, who will provide you with training and ongoing support to help you execute your duties and build your career.

Qualifications and Skills

As the ideal candidate, you have:

- Completed a bachelor’s or college diploma in Finance, Business Administration, or a similar field.
- Excellent written and verbal communication skills and have strong typing and note taking skills, including being able to transcribe client meeting notes efficiently and accurately.
- Advanced level computer skills with a strong knowledge of Microsoft Office Suite.
- Knowledge of Conquest financial planning software is an asset.
- Exceptional organizational skills and can easily multi-task in a dynamic environment.
- A "team player" attitude and do whatever is needed, big or small. You manage and get along with diverse personalities.
- Well-developed interpersonal skills and a perfectionist’s eye regarding details.

Mandatory

- Work from the office for the first three months, followed by the hybrid policy schedule for all Wealth Stewards employees.
- 40 hours/week availability, Monday to Friday (9am to 5pm)

Job Type
Full Time, Permanent

About Us
At Wealth Stewards, we believe in putting our clients’ interests first (fiduciary standard) and helping our affluent clients understand and successfully use their financial resources to accomplish their family, career, business and personal goals. In addition to working with our clients, we assist accountants with integrating financial planning and wealth management into their practices.

We have won the 2017 and 2018 Global Financial Planning Awards in Canada, and follow-up for the Americas in 2018. In 2024, we received the Excellence Awardee for the Franklin Templeton Award for Advisory Team of the Year (10 staff or more) as presented by the Wealth Professional Awards.

As a member of our team, we encourage advancement and growth. We value hard work, excellence and have created a culture that will foster the support and resources you will need to reach your potential via coaching, in-depth training and network-building opportunities.

To find out more visit us at: https://www.wealthstewards.ca/.

How to Apply
Send your resume and cover letter to our Office Manager, Marizaan Davids at mdavids@wealthstewards.ca with the subject line: WSI_WMA25. All resumes will be reviewed and those selected will be contacted to complete an application explaining more about you and your experience.

Upon reviewing applications, selected applicants will be contacted for a telephone pre-screen conversation. Successful candidates will be invited to an online interview with the Office Manager and another team member. The next step is likely an in-person meeting. The candidate will have to pass a criminal, credit check and the final step is the completion of positive character and work references. Then management will make a hiring decision and extend an offer.

Upon acceptance, we will prepare everything for your first week including technology and network access, as well as one-on-one meetings with various staff members and training to get you started.

Wealth Stewards is proud to be an Equal Employment Opportunity employer. We celebrate diversity and do not discriminate based on race, religion, color, national origin, sex, sexual orientation, age, veteran status, disability status, or any other applicable characteristics protected by law. Upon request, we will provide reasonable accessibility accommodations throughout the recruitment process.