



## **Senior Wealth Planner, Advanced Wealth Planning**

**Location:** This position can be based out of any of our office locations across Canada.

### **Our organization:**

Founded in 2017, Wellington-Altus Financial Inc. (Wellington-Altus) is the parent company to Wellington-Altus Private Counsel Inc., Wellington-Altus USA Inc., Wellington-Altus Insurance Inc., Wellington-Altus Group Solutions Inc., and Wellington-Altus Private Wealth Inc.—the top-rated\* investment dealer in Canada and one of Canada's Best Managed Companies. With more than \$30 billion in assets under administration and offices across the country, Wellington-Altus identifies with successful, entrepreneurial advisors and portfolio managers and their high-net-worth clients.

*\*Investment Executive 2024 Brokerage Report Card.*

### **The opportunity:**

Reporting to the Associate Vice-President, Advanced Wealth Planning the Senior Wealth Planner is responsible for providing comprehensive wealth solutions for Wellington-Altus (WA) clients, and wealth planning support and value-added services to WA Advisory teams.

Leveraging their industry and/or professional knowledge and experience, the Senior Wealth Planner will develop, execute, and maintain comprehensive wealth plans for business owner, incorporated professional and other high-net-worth clients, and act as a resource for WA Advisory teams.

### **Key responsibilities include:**

- Facilitating/participating in goals-based discovery process directly with existing and potential clients, helping them to articulate and identify their short and long-term goals.
- Identifying and entering client information into planning software and generate financial and other wealth plan aspects.
- Leveraging financial analysis to create and develop detailed wealth plans for high net worth and ultra-high net worth clients.
- Managing the various wealth planning deliverables.
- Collaborating and works closely with client's other professional advisors in the spirit of delivering a holistic experience.
- Proactively maintaining current and in-depth knowledge of all areas of the wealth planning process, including financial, education, insurance and risk management, retirement, tax, business and estate



- Driving the WAPW wealth planning process and continuously look for ways to improve and enhance the WAPW client experience.
- Assisting in developing thought leadership on wealth planning topics.
- Recognizing and fosters intergenerational wealth management amongst WA advisors and their client
- Collaborating with Advanced Wealth Planning peers to deliver training and education initiatives for WA Investment Advisory teams.
- Performing other duties as assigned.

**The ideal candidate will possess:**

- A degree or diploma in business administration, accounting, finance, or similar field of study.
- A minimum of 5 years' experience in a wealth planning role.
- Income Tax and Insurance background an asset.
- Experience working with high-net-worth clients, business owners and foreign assets is an asset.
- CFP or equivalent financial planning designation.
- Professional designation such as TEP or CLU is an asset.
- Experience using Conquest or NaviPlan is an asset.
- Proficiency with the MSOffice suite, including Word, Excel, PowerPoint, Teams, and Outlook.
- Strong organizational, analytical skills and attention to detail.
- An ability to work independently and as part of a national team whose members have varied backgrounds and industry experience.
- An ability to exhibit a high level of professionalism that allows clients to feel comfortable discussing personal, confidential information.
- Strong presentational skills.
- An ability to keep up to date with Canada's overall economic and financial environment, current events and trends and changes to legislation as it relates to income tax and wealth transfer planning.
- An entrepreneurial spirit to participate in Wellington-Altus's continued growth, and a desire to continuously exceed our client expectations.



- Strong written and verbal communication skills.

**Conditions of employment:**

- Must be legally eligible to work in Canada.
- Must be able to travel 0-5% of the time.
- A background check, satisfactory to the employer, may be required of the successful applicant prior to commencing employment.

Wellington-Altus Private Wealth is strongly committed to equity and diversity within its community and welcomes applications from women, racialized persons, Indigenous peoples, persons with disabilities, and persons of all sexual orientations and genders. All qualified individuals who would contribute to the further diversification of our organization are encouraged to apply.

If you require accommodation for the recruitment process, please let us know at the point of application.

**To apply:**

Click the Apply for This Job button to submit your resume, cover letter and salary expectations. You will be contacted if you are selected for an interview. More information about working at Wellington-Altus can be found on our website at [www.wellington-altus.com](http://www.wellington-altus.com).