ABOUT US

Assante Private Client, a subsidiary of CI Private Counsel LP and a CI Financial Company, provides portfolio management and wealth management advisory services exclusively through a national network of financial advisors. Focusing on high net worth individuals and families, the professionals at Assante Private Client offer financial planning, risk management, and estate and tax planning services to our clients, helping them simplify and enhance their lives.

POSITION: Wealth Planning Consultant (Estate Planning Lawyer)
LOCATION: Toronto or Winnipeg
STATUS: Full-time

JOB OVERVIEW

We are currently recruiting for an experienced lawyer with in-depth estate planning knowledge for the position of Wealth Planning Consultant (Estate Planning Lawyer).

Based in Winnipeg or Toronto, the successful candidate will be responsible for providing advice and strategies to existing clients of our financial advisors, primarily through the preparation of comprehensive client reports. Many of our clients are high net worth individuals and business owners. Our niche is in the provision of comprehensive wealth planning services. We go far beyond investments and include in-depth estate planning, tax planning and risk management in our suite of services.

WHAT YOU WILL DO

- Prepare comprehensive estate planning reports for clients
- Communicate with clients' professional legal advisors to discuss issues and recommendations
- Respond to estate planning inquiries from our financial advisors and other corporate personnel
- Prepare research papers and client newsletter articles on estate planning topics
- Train and educate corporate staff and financial advisors on estate planning matters
- Maintain complete confidentiality relating to all client matters
- Maintain professional standards and designations through continuing education and professional development
- Work with colleagues within the company and the company's clients in a professional manner, displaying the utmost respect for fellow workers and clients

WHAT YOU WILL BRING

- A professional legal designation and active membership in a Canadian law society
- 3+ years of professional experience specializing in estate planning

- Strong analytical skills and technical knowledge
- Excellent communication skills with an emphasis on writing
- High degree of accuracy and attention to detail and strong organizational skills
- Ability to work independently and as part of a multi-disciplinary team
- Ability to work effectively and efficiently in a fast-paced environment
- Excellent computer skills, including Microsoft Word, Excel, PowerPoint, and legal research

WHAT YOU CAN EXPECT FROM US

- Collaborative and friendly team environment
- Opportunities to develop and grow within the company
- Health and Wellness programs including discounted corporate fitness membership

If you are a passionate, committed and dynamic individual, please apply by clicking on the following link: https://www.workopolis.com/jobsearch/job/17993043

Only qualified candidates selected for an interview will be contacted.

CI Financial Corp. and all of our affiliates ("CI") are committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at accessible.recruitment@ci.com, or call 416-681-4747. If you are contacted by CI regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.