ABOUT US

Assante Private Client, a division of CI Private Counsel LP, is a wealth management firm serving high net worth individuals, families and business owners across Canada. Assante Private Client provides investors with a complete approach to financial advice that incorporates all aspects of wealth management – tax and estate planning, risk management and investment management. For more information, please visit www.assante.com.

POSITION: Wealth Planning Consultant (Estate Planning Lawyer)
LOCATION: Winnipeg, MB (R3C 4T3)
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).

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

WHAT YOU WILL DO

- Prepare comprehensive estate planning reports for clients
- Respond to estate planning inquiries from Assante financial advisors and corporate personnel
- Communicate with clients' professional legal advisors to discuss issues and recommendations
- Prepare 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
- 4+ years of professional experience specializing in estate planning (practitioners with more years of experience are welcome to apply)
- 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
Our dedication to the Employee Experience at CI is aimed at supporting, empowering and inspiring our talented team through:

- Recognition & Compensation
- Training & Development
- Health & Well-being
- Communication & Feedback

If you are a passionate, committed and dynamic individual, please submit your cover letter and resume in confidence by clicking on the following link:
https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=497c2cd4-4fbf-4531-b861-5af37f7b50ed&ccId=19000101_000001&jobId=263349&source=CC2&lang=en_CA

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.