Assante
PRIVATE CLIENT

ABOUT US

CI Private Counsel, a subsidiary of CI Financial, provides a broad range of portfolio and wealth management solutions exclusively through a national network of financial advisors affiliated with Assante Wealth Management and Stonegate Private Counsel. We operate under the brand Assante Private Client. CI Private Counsel is part of CI Financial, a diverse group of financial services firms with about $179.8 billion in total assets at April 30, 2019.

POSITION: Regional Vice-President, Wealth Planning
LOCATION: Toronto
STATUS: Full-time

JOB OVERVIEW

We are currently seeking a Regional Vice President, Wealth Planning to join our Wealth Planning team.

In this role, the successful candidate will be responsible for providing comprehensive and integrated wealth planning services and support for CI Private Counsel and clients of Assante Wealth Management and Stonegate Private Counsel.

Recognizing the complex and diverse needs of our clients, comprised largely of successful business owners and high net worth families; you will take a holistic approach to identify client needs and proactive planning opportunities leveraging past experiences in tax planning.

This role provides the opportunity to collaborate with members of both our regional and national wealth planning team and professionals from some of Canada's top legal and accounting firms, your passion is supporting advisors in delivering a truly differentiated experience their clients will value and talk about. The individual works as a part of a team consisting of estate planning specialists, tax specialists, financial planners, investment counselors, and insurance specialists.

WHAT YOU WILL DO

- Meet with financial advisors and their current and prospective clients to discuss tax planning strategies
- Present tax plans prepared by our centralized Wealth Planning Group for high net worth clients and work with their client's existing professionals on timely implementation
- Prepare memos relating to specific estate planning questions raised by clients, financial advisors and other corporate team members
- Train and educate financial advisors and corporate staff on estate planning matters
- Review draft legal documents related to planning and collaborate with legal counsel regarding same
- Develop and present seminars for advisors, clients and prospective clients on various relevant tax planning topics

- Meet with financial advisor’s centers of influence (professional legal and accounting firms) to demonstrate and promote the benefits of our collaborative wealth planning process
- Respond to enquiries from financial advisors and corporate staff on wealth planning matters
- Prepare articles/reference materials on a variety of wealth planning topics as well as technical content for business development material on an occasional basis

WHAT YOU WILL BRING

- A professional accounting or legal designation and the completion of the CICA in-depth tax course, CBA Tax Law for Lawyers program, a Masters in Taxation or equivalent is required
- Minimum of five years of professional experience in an owner-manager tax practice. Experience in estate planning would be an asset
- CFP designation or TEP designation would be an asset
- Operate with a high level of professionalism, skills and knowledge and able to communicate complex planning strategies in an understandable way to advisors, clients and their professional advisors
- Strong presentational skills for presenting to large and small groups
- Ability to work independently and as part of a national team
- Strong organizational, analytical skills and attention to details
- Experience with Microsoft Office and computer based income tax research software

WORKING CONDITIONS

- Office environment
- Same day travel around Ontario with the occasional overnight

WHAT YOU CAN EXPECT FROM US

- Collaborative and friendly team environment
- Opportunities to develop and grow within the company

To apply, please click here and navigate to the “Regional Vice-President, Wealth Planning” job posting.

Only qualified candidates selected for an interview will be contacted.