



Vice-President, Advanced Wealth Planning

Location:

May be based out of any WAPW location across Canada.

Role Description:

Wellington-Altus is currently recruiting for two (2) Vice-Presidents, Advanced Wealth Planning to join our Advanced Wealth Planning team.

Reporting to the Senior Vice-President, Advanced Wealth Planning, the Vice-President, Advanced Wealth Planning is responsible for the development, execution and maintenance of comprehensive wealth plans and goals-based reporting for WAPW ultra-high-net-worth clients.

Leveraging their significant industry knowledge and experience providing comprehensive financial solutions to UHNW clients, the Vice-President, Advanced Wealth Planning will play an integral role in business development and will provide value-added services to WAPW Investment and Insurance Advisors and their successful business owner, incorporated professionals and other UHNW clients.

As the Vice-President, Advanced Wealth Planning, you will:

- Cultivate client relationships by meeting with existing and potential clients and completing in-depth fact finding as it pertains to their complex and diverse advanced wealth planning needs or concerns.
- Proactively maintain current and in-depth knowledge of all areas of the wealth planning process, including financial, investment, education, insurance and risk management, retirement, tax and wealth transfer planning.
- Drive the UHNW WAPW wealth planning process and continuously look for ways to improve and enhance the UHNW WAPW client experience.
 - Co-ordinate the preparation of an introduction package with an engagement letter, document request and Wealth Questionnaire. Co-ordinate with client's existing tax and legal professionals on behalf of the client for required documents.
 - Manage the various UHNW wealth planning deliverables through the process.
 - Review UHNW wealth planning deliverables and/or client goals-based reporting relating to specific income tax and wealth transfer topics raised by clients or WAPW Investment and Insurance Advisors.

- Identify outside assets and referral/Centers of Influence opportunities.
- Work in collaboration with Advanced Wealth Planning peers in training and education initiatives with WAPW Investment Advisory teams on income tax and wealth transfer matters.
- Provide expert advice and guidance, to other Advanced Wealth Planning team members when reviewing legal, income tax and financial documentation.
- Develop and maintain relationships with Centers of Influence.
- Collaborate and work closely with client's other professional advisors in the spirit of delivering a holistic experience.
- Recognize and foster UHNW intergenerational wealth management amongst WAPW advisors and their client families.
- Develop and present seminars for WAPW advisors and their client families on a variety of UHNW income tax and wealth transfer planning topics.
- Perform other duties as assigned.

Your education and qualifications include:

- A professional accounting or legal designation.
- Completion of the CPA In-depth tax course, CBA Tax Law for Lawyers program, a Masters in Taxation or equivalent is required.
- Minimum of 5 years' experience in income tax and wealth transfer planning.
- FEA, TEP, CFP, or CLU designations would be an asset.
- Willingness and ability to fulfill continuing education requirements.

Conditions of Employment:

- Must be legally eligible to work in Canada
- A background check, satisfactory to the employer, may be required of the successful applicant prior to commencing employment

To apply, please email your resume to careers@wprivate.ca

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.