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WELLINGTON-ALTUS
PRIVATE WEALTH

Senior Wealth Planner

Location:
Toronto

Role Description:
Wellington-Altus is currently recruiting for a Senior Wealth Planner to join our Advanced Wealth Planning team.

Reporting to the Senior Vice-President, Advanced Wealth Planning the Senior Wealth Planner is responsible for the development, execution and maintenance of comprehensive wealth plans and goals-based reporting for WAPW clients. The Senior Wealth Planner will play an integral role in business development and will provide value-added services to WAPW Investment and Insurance Advisors and their clients.

As the Senior Wealth Planner, you will:

- Meet with existing and potential clients. Help clients to articulate and identify their short and long-term goals.
- 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 WAPW wealth planning process and continuously look for ways to improve and enhance the WAPW client experience.
    - Prepare an introduction package with an engagement letter, document request and Wealth Questionnaire.
    - Identify and enter client information into planning software and generate financial and other wealth plan aspects.
    - Manage the various wealth planning deliverables through the process.
    - Review wealth plan deliverables and goals-based reporting with Investment Advisor and their clients.
    - Identify outside assets and referral/Centers of Influence opportunities.
- 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 intergenerational wealth management amongst WAPW advisors and their client families.

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- Work in collaboration with Advanced Wealth Planning peers in training and education initiatives with WAPW Investment Advisory teams.
- Develop and present seminars for WAPW advisors and their client families on a variety of wealth planning topics.
- Perform other duties as assigned.

Your education and qualifications include:

- Degree or Diploma in business administration, accounting, finance, or similar field of study.
- Minimum of 3 years' experience in a wealth planning role.
- Professional designation such as CFP, PRP, TEP or CLU.
- Income Tax and Insurance background a preference.

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.