



Senior Associate

Location:

Calgary

Role Description:

Wellington-Altus is currently recruiting for an Associate to support the West Oak Family Office team in Calgary. Reporting to the Executive Vice-President, you will leverage your industry knowledge, business development and customer service skills to provide exceptional customer and financial services to our clients and internal partners.

As the Senior Associate, you will:

- Act as a general resource person for clients (ex: prepare letters, client communication pieces, etc.)
- Manage client relationships with a commitment to providing extraordinary service
- Assist with business development by coordinating opportunities, following up on prospective client leads, using a CRM tool to develop pipeline and opportunities for revenue and asset under administration growth
- Respond to client emails and phone calls in a timely, warm and friendly manner
- Proactively maintain current knowledge of policy and procedure changes within the firm and industry
- Exhibit a level of professionalism that allows clients to feel comfortable and able to discuss personal information
- Commit to a rigorous follow up relating to all client transactions to ensure proper processing and minimize errors
- Complete account processing activities along with more complex activities related to global reporting, and proactive wealth planning
- Perform other duties as assigned

Your education and qualifications include:

- Undergraduate degree
- A minimum of 3 years' industry experience, preferably in an administrative, wealth planning or operational capacity
- Completion of a financial planning designation such as WME, PFP or CFP is not required, but considered an asset
- Strong organizational skills with excellent attention to detail
- Entrepreneurial spirit with willingness to learn
- Demonstrate a reliable work ethic with the ability to manage multiple, competing priorities
- Ability to adapt quickly to changing needs and work requirements
- Demonstrate a high proficiency in Microsoft Office applications



Conditions of Employment:

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

To apply, please send 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.