



Senior Wealth Advisor

Location:

Calgary

Role Description:

Wellington-Altus has an opportunity with the West Oak Family Office team. This particular office takes a broad view to wealth planning and protection of family assets and in addition to investment management, provides ideas to clients to help them save tax, help with implementation, and then the monitoring of structures and strategies to ensure they remain appropriate as their clients' philosophies and lives evolve.

As the Senior Wealth Advisor, you will:

- Keep up to date with the overall economic and financial environment, current events, market conditions, trends and changes to legislation as it relates to tax and estate planning.
- Assist the team in reviewing high net worth files, providing ideas to help save tax and protect capital, while also summarizing their various structures they have in place
- Ensure customer service standards/operational procedures are communicated and maintained
- Actively seek out and maintain client relationships with a focus to providing extraordinary service
- Proactively maintain current and in-depth knowledge of all areas of the wealth planning process, including financial, investment, education, risk management, retirement, tax and wealth transfer planning.
- Perform other duties as assigned.

Your Education and Experience Include:

- Degree or Diploma in Business Administration, Finance or Accounting.
- Professional designations CPA, CA is required, CPA level 1 in-depth tax course preferred
- Professional designation such as PFP, CFP, TEP is preferred
- Minimum of 5 years' industry experience, preferably in a wealth planning role
- Recent knowledge and experience in personal, trust and corporate taxation, as well as overall estate planning knowledge as it related to wills and philanthropy.
- Excellent computer skills with proficiency in a variety of programs, including MS Office
- Demonstrated ability to communicate clearly and professionally, both verbally and in writing
- Experience providing customer service in a professional environment
- Ability to manage a variety of projects with rapidly changing deadlines and priorities

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 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.