Associate Wealth Advisor

Associate Wealth Advisor – Nelson Financial Consultants

Are you passionate about working directly with clients as their primary Wealth Advisor? Do you love to work across all aspects of wealth management services (Financial planning, Investments and Insurance)? Are you wishing to be part of a Wealth Management team, serving the complex needs of individuals and their families? If so, then the Nelson Financial team may be right for you.

Nelson Financial Consultants (https://nelsonfinancial.ca/) is a wholly owned subsidiary of BCV Asset Management Inc. that provides financial planning, portfolio management and insurance services to high net-worth families. Together we are a growing investment firm, based in Winnipeg, that collectively manages over $5 billion in client assets. Our firm is built around an award-winning culture, investment performance, excellence in client service, and long-term business relationships.

As an integral member of this dynamic team, you are enthusiastic about helping clients succeed and achieve their financial goals. You will develop and enhance client relationships while building and managing our clients' wealth.

Tasks, Role & Responsibilities:

We describe the responsibilities of an Associate Wealth Advisor as servicing all aspects of client relationship management, including;

Financial Planning:

- Demonstrate a comprehensive understanding of our clients and responsibility for understanding their current lifestyle goals and financial picture.
- Provide guidance and comprehensive financial advisory regarding savings and wealth accumulation, tax efficient income planning, portfolio construction and risk management as well as insurance and estate planning

Portfolio Management:

- Comprehensive understanding of the current market environment, as well as adhering to Nelson Financials' investment style, primarily invested into a combination of one or

more proprietary investment pools as well as some individual securities.
- Execute portfolio transactions within the guidelines of individual client Investment Policy Statements, as well as annual reviews, KYC updates, and AML assessments to ensure the asset mix is appropriate for our clients.
- Incorporate a comprehensive understanding of the regulatory environment in which BCV operates.

Insurance Advisory:
- Provide insurance advice to complete a standard insurance analysis, prepare new insurance applications, and will meet with clients to deliver new and updated policies.

Critical Knowledge, Skills and Abilities:
- Strong sense of accountability to colleagues and clients.
- Proactive with a willingness to take initiative.
- Commitment to working together in a positive and collaborative team environment.
- Exceptional communication and interpersonal skills.
- Tech savvy, advanced proficiency in Microsoft Office and investment management applications.
- Commitment to ongoing education and professional development.
- 5+ years of related work experience in the financial services industry, with an unblemished record of regulatory compliance.

Educational Requirement:

Post-secondary education, particularly the Certified Financial Planner (CFP) designation or presently close to completion is desired as well as a Chartered Investment Manager (CIM) designation, or presently close to completion is also desired.

Just the start of what BCV can offer:

- A comprehensive suite of Health Care & Wellness benefits.
- Strong educational support and professional development.
- Highly competitive compensation and profit sharing.
- RRSP matching, weekly chef, and much more.

We are committed to diversity and inclusion and welcome applications from all genders, all cultures, persons with disabilities, and persons of all sexual orientations.

If you possess the above skills and traits, and desire to grow and make a difference with our amazing local company, we invite you to learn more about this exciting opportunity. Please submit your resume and cover letter in confidence to Kimberly Wallace, Manager, People and Culture at kwallace@bcvfinancial.com.

If you require accommodation for the recruitment process, please let us know when you submit your application.

We sincerely appreciate your interest and thank all applicants, however, only those selected for an interview will be contacted.