Join Ewert Group Private Wealth Management - Certified Financial Planner CFP®
Location: Niagara Region (Grimsby & St. Catharines), ON

With a strong reputation for exceptional client service and strategic wealth management, Ewert Group Private Wealth Management specializes in working with high-net-worth individuals and families, providing tailored solutions for investment management, tax optimization, estate planning, and wealth preservation.

As we continue to expand, we are seeking an experienced Certified Financial Planner (CFP®) to join our team in a senior advisory role. This is an opportunity for a passionate, client-focused professional to take a high-impact position within a dynamic practice.

The Ewert Group Advantage

- Work in a collaborative, high-performing team with a strong reputation for excellence
- Make a meaningful impact on the financial success of high-net-worth clients
- Growth-oriented career path in an innovative, client-centric wealth management practice
- Continuous professional development and mentorship to elevate your expertise
- A firm that values integrity, innovation, and client-first service

Your Key Responsibilities

As a CFP®, Senior Associate Consultant, you will be a key contributor in delivering sophisticated financial planning solutions. You will work closely with our advisory team to provide expert guidance in:

- Comprehensive financial planning: assessing client goals, cash flow, and designing forward-thinking strategies.
- Tax planning and optimization: identifying opportunities for tax efficiency and wealth preservation.
- Estate and succession planning: helping clients structure their wealth for future generations.
- Investment strategy alignment: working with advisors to integrate financial planning with portfolio management.
- Client education and relationship management: simplifying complex financial concepts and building lasting trust.

The Ideal Candidate

- A CFP® designated professional with a passion for delivering exceptional client experiences
- A strategic thinker who can translate financial complexities into clear, actionable steps
- A highly motivated, detail-oriented individual who thrives in a dynamic environment
- A strong communicator and relationship-builder who instills confidence in clients

Essential Skills & Experience

- CFP® designation required
- 5+ years of experience in financial planning and wealth management
- Proven experience working with high-net-worth clients
- Strong knowledge of Canadian tax laws, estate planning, and investment strategies
- Proficiency in financial planning software and Microsoft Office Suite (Excel, Word, PowerPoint)

Our Culture & Growth Opportunities

At Ewert Group, we foster a collaborative and supportive environment where client success is at the heart of everything we do. We value integrity, innovation, and a client-first mindset, and we're committed to continuous growth, both for our team and the clients we serve.

This is more than a financial planning role; it's an opportunity to play a strategic role in shaping the future of an established wealth management practice. You'll be working closely with top advisors, expanding your expertise, and making a meaningful impact on clients' financial well-being.

Expression of Interest

If you're excited about this opportunity and believe you'd be a great fit, we'd love to hear from you! Please send your resume and cover letter to shannon.engel@igpwm.ca.