We are hiring a full-time Associate Financial Advisor in the Kitchener Waterloo area, for a local Financial Services team. This position requires a forward-thinking, energetic, ambitious, and hard-working investment professional who puts client's needs above all else. The successful candidate must have a positive attitude, meticulous attention to detail, superior interpersonal skills, and a team-player mentality.

Who you are:
Client-centered, always putting client interests first
Entrepreneurial
Curious and willing to dig deep to find solutions to complex problems
Able to build strong, lasting relationships with clients
Able to work independently and in a team
Willing to be flexible, occasionally working long hours

Qualifications:
IIROC Licensed
Working towards CFP
Minimum of 3 years of experience in the Investment/Financial Services industry in an advice-giving capacity
Basic to in-depth understanding of financial products & markets
Experience using Microsoft Office suite (especially Excel)

What you will do:
Work closely with the advisor to manage investment portfolios
Deal directly with clients, attend select client meetings, present investment ideas, and encourage disciplined investor behaviour
Analyze the portfolios of prospective, new, and existing clients
Build, monitor and rebalance customized investment portfolios in accordance with the client's profile and compliance requirements
Conduct research and analysis to help with investment selection and asset mix decisions Perform due diligence on mutual funds, and other investments as required
Prepare investment proposals and client review presentations
Conduct data entry and analysis in the preparation of Financial Plans using Naviplan software
Provide high quality client service, including phone, email, written and in-person communication
Coordinate with the team to ensure that client portfolios are consistent and aligned with the clients' financial plans
Liaise with external service providers in the planning process, primarily with Accountants and Lawyers
Maintain high standards of ethics, integrity, objectivity, and expertise
Trade entry, only on rare occasions when other staff members are unavailable

If you are interested in continuing your financial services career with this Financial Services organization, please apply with a cover letter to pat@thepersonalcoach. We are looking forward to getting to know you.
While we thank all applicants for their interest, please note that only those individuals selected for an interview will be contacted.