Wealth Planning Associate

Job Summary

Wealth Stewards Inc. is seeking a highly motivated recent grad (or soon to graduate) to fill a new position as a Wealth Planning Associate at our boutique wealth management firm. This individual will work in a dedicated role providing financial planning input, calculations, and advice for our firm's Wealth Advisors and Portfolio Managers.

This is an ideal opportunity to learn financial planning with a skilled team of high-net worth Advisors. Ours is a nimble team of dedicated financial professionals who work collaboratively and transparently towards a common goal – our clients' satisfaction and peace of mind. Every day, we seek to bring value to our clients and affect real change in their financial lives.

This job requires the candidate to initially work from the office during the probationary period of three months, then transition to a hybrid set-up thereafter. Our office is located in the west end of Toronto.

Key Responsibilities

Working alongside our Wealth Advisors and Portfolio Managers, you will learn to prepare financial plans using industry-standard software (i.e., Conquest, YCharts) that provides meaningful information for our advisors to present to their clients. You will:

- Support Wealth Advisors in pre-client-meeting preparation, prepare financial plans for review by a Wealth Advisor, and follow up on post-client meeting work.
- Attend client meetings and take notes required for preparation of financial plans and/or that are relevant to action items, tasks, and decisions made during appointments.
- Assist when required in the timely and accurate completion of new account openings, account and cash transfers, forms, and other administrative documents and transactional requests for planners and clients as well as advising them when required.
- Maintain client files and information in the appropriate systems.
- Ensure all client interaction is accurately documented
- Understand the required documentation for all client account types.
- Gather and analyze data to identify and solve complex problems, escalate as required.
- Create and maintain Excel Spreadsheets.
- Identify opportunities to gather additional assets and/or increase revenue within the existing client base (i.e., referrals, consolidation of assets, insurance, etc.).
- Assist in preparing, analyzing, and presenting reports and recommendations, financial plans/concepts, etc. for Advisor to review.
- Respond to client inquiries and assist with client requests to provide the highest level of client service.
- Build a positive experience at every interaction and look for ways to continually improve Wealth Advisor and client satisfaction.

Every day, you demonstrate strong attention to detail and exhibit an excellent work ethic. At Wealth Stewards we encourage questions and recommendations for improvement from you and all other team members. We believe that wearing multiple hats and cross team collaboration is essential to excelling in a small business culture.

You will report to the Chief Operating Officer, who will provide you with training and ongoing support to help you execute your duties and build your career.

Qualifications

As the ideal candidate, you have:

- Completed a bachelor’s in finance or a college diploma in Financial Planning and have achieved, or are working towards your Certified Financial Planner (CFP) designation.
- Excellent written and verbal communication skills and have strong typing and note taking skills, including being able to transcribe client meeting notes efficiently and accurately.
- Advanced level computer skills with a strong knowledge of Microsoft Office Suite.
- Knowledge of Conquest financial planning software is an asset.
- Exceptional organizational skills and can easily multi-task in a dynamic environment.
- A "team player" attitude and do whatever is needed, big or small. You manage and get along with diverse personalities.
- Well-developed interpersonal skills and a perfectionist’s eye regarding details.

Mandatory

- Work from the office for the first three months, followed by the hybrid policy schedule for all Wealth Stewards employees.
- 40 hours/week availability, Monday to Friday (9am to 5pm)

Job Type

Full Time, Permanent

About Us

At Wealth Stewards, we believe in putting our clients’ interests first (fiduciary standard) and helping our affluent clients understand and successfully use their financial resources to accomplish their family, career, business and personal goals. In addition to working with our clients, we assist accountants with integrating financial planning and wealth management into their practices.

We have won the 2017 and 2018 Global Financial Planning Awards in Canada, and follow-up for the Americas in 2018. In 2024, we received the Excellence Awardee for the Franklin Templeton

Award for Advisory Team of the Year (10 staff or more) as presented by the Wealth Professional Awards.

As a member of our team, we encourage advancement and growth. We value hard work, excellence and have created a culture that will foster the support and resources you will need to reach your potential via coaching, in-depth training and network-building opportunities.

To find out more visit us at: https://www.wealthstewards.ca/.

How to Apply

Send your resume and cover letter to our Office Manager, Marizaan Davids at mdavids@wealthstewards.ca with the subject line: WSI_WPA25. All resumes will be reviewed and those selected will be contacted to complete an application explaining more about you and your experience.

Upon reviewing applications, selected applicants will be contacted for a telephone pre-screen conversation. Successful candidates will be invited to an online interview with the Office Manager and another team member. The next step is likely an in-person meeting. The candidate will have to pass a criminal, credit check and the final step is the completion of positive character and work references. Then management will make a hiring decision and extend an offer.

Upon acceptance, we will prepare everything for your first week including technology and network access, as well as one-on-one meetings with various staff members and training to get you started.

Wealth Stewards is proud to be an Equal Employment Opportunity employer. We celebrate diversity and do not discriminate based on race, religion, color, national origin, sex, sexual orientation, age, veteran status, disability status, or any other applicable characteristics protected by law. Upon request, we will provide reasonable accessibility accommodations throughout the recruitment process.