Investment Associate

Location: Winnipeg, MB

Role Description:

[Redacted] Private Wealth has an opportunity with the [Wealth Management] Team in our Winnipeg head office. The Investment Associate position is ideal for an individual looking to build their career and book of business with an award-winning company and team.

We are looking for a driven professional individual who is wanting to grow a client base and work within a team environment. You will play an integral role in business development, client origination, marketing, as well as participate in the investment and financial planning process for clients.

As an Investment Associate, you will:

- Work within a team environment.
- Be responsible for assisting in growing the client base through networking, marketing, and sales.
- Manage and grow an existing client base.
- Provide investment and wealth management advice.
- Be proactive in identifying opportunities for clients.
- Prepare and manage financial plans.
- Be proficient in all areas of administration.
- Acts as a resource person for clients (ex: generating specialized reports, questions about specific products).
- Meet with existing and potential clients, complete in-depth fact finding. Help clients to discover and articulate their short- and long-term goals.
- Performs other duties as assigned to support the team.

Your education and qualifications include:

- University degree, preferably in commerce or finance.
- Completion of CSC/CPH is an asset
- Interest in pursuing CFP or CFA
- Willingness to obtain registration as an IR within a reasonable timeframe at the employer's expense; including completion of all courses and experience requirements with IIROC with the ongoing obligations to fulfill Continuing Education requirements.
- Comprehensive knowledge of topics related to the financial and securities industry, including investment and insurance products and services.
- Strong organizational skills with excellent attention to detail.
- Demonstrated, reliable work ethic with the ability to manage multiple, competing priorities.
- Ability to adapt quickly to changing needs and work requirements.

- Client-focused attitude with a commitment to cultivating relationships and providingexceptional service.
- Demonstrated, high proficiency in Microsoft Office tools and financial software.

Conditions of Employment:

- Must be legally eligible to work in Canada.
- Successful completion of Canadian Securities Course is required A background check, satisfactory to the employer, will be required of the successful applicant prior to commencingemployment.

[Redacted] 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 thefurther diversification of our organization are encouraged to apply and are encouraged to self-identify on their application.

If you require accommodation for the recruitment process, please let us know at the point ofapplication.

Please send your resume to: careers@example.ca and include which position you're applying for inthe subject line.