



WEALTH PARTNERS

**JOB TITLE:** Investment Advisor, Corporate

**LOCATION:** Toronto, Ottawa, Montreal, Calgary, Vancouver, Victoria

**INDUSTRY:** Financial Services

**REPORTING TO:** Local Branch Manager

**POSITION OVERVIEW:**

Echelon is growing and actively seeking seasoned Investment Advisors in nearly all major cities across Canada. Our national platform provides an opportunity to build your business with an independent Canadian company that truly values Partnership.

With strong financial roots, Echelon offers: renowned research, market-leading commission structure, unique access to special situations, holistic business planning tools, mentoring and a distinct culture recognized by Great Place To Work Canada®. We are looking for Advisors who are internally aligned with our own corporate pillars of Respect, Honesty, Transparency and Integrity.

This is an excellent opportunity for experienced and dedicated Advisors with an existing book of business to join a mission-oriented company with a fresh brand and future growth potential.

**CORE DUTIES & RESPONSIBILITIES**

- Build and develop your client base as you manage and grow their portfolios, selecting the most appropriate investment solutions to meet their financial plans and goals
- Build trusted and diverse relationships with business owners, individuals, families, professional associations and foundations, based on personalized client services and advice
- Establish and maintain reciprocal relationships across all Echelon teams and stakeholders
- Participate in key initiatives that advance our strategy, reputation and brand

**REQUIRED EXPERIENCE, EDUCATION, SKILLS AND BEHAVIOURS**

- 5 years of Investment Advisory experience within an IIROC regulated environment
- Outstanding relationship-building and interpersonal skills

- Exceptional verbal, non-verbal and written communication skills
- Polished presentation and consultative skills – must be able to gain credibility and respect across a diverse spectrum of professional services clients
- Ethical, trustworthy and fully committed to supporting business objectives while ensuring all regulatory and compliance controls are maintained at all times
- Team-player – oriented and invested in continuing to cultivate a unique identity, brand and company culture

## **WE OFFER**

- The flexibility to be your own boss while working within a national platform
- Operational support for a variety of advisor practice styles, from transactional and deal-oriented to managed account and fee for service
- Planning and development tools to help you grow your business with one-on-one coaching by local and national branch leaders to help you assess your business, develop an individual plan and partner in implementation
- Comprehensive onboarding process and continuous education / development programs
- Virtually unlimited investment solutions backed by top-ranked research
- Unlimited earning potential and a competitive benefits package
- Strong corporate structure with established Sales Administration, Marketing, Technology, Compliance and Operations teams

## **PROFILE SUBMISSION:**

To submit your profile for consideration, please copy and paste this link into your browser <https://echelonpartners.bamboohr.com/jobs/view.php?id=22> and click “Apply for this Job”. We thank all applicants for their response but only those considered for an interview will be contacted.