ECHELON

WEALTH PARTNERS

JOB TITLE: Investment Advisor, Separately Managed Accounts

LOCATION: Toronto, ON

INDUSTRY: Financial Services

REPORTING TO: Head of Asset Management / Managing Director, Investment Banking

POSITION OVERVIEW:

Reporting directly to Head of Asset Management/Managing Director Investment Banking, the Investment Advisor, Separately Managed Accounts, will be assigned to a dedicated institutional client for Echelon Wealth Partners and will oversee all investment, regulatory and financial services needs for that client. This role will be physically located on-site in North York but report into the Head of Asset Management/Managing Director, Investment Banking in downtown Toronto. This role will work seamlessly across multiple groups including our client's financial planners, stakeholders and Echelon's Investment Banking and Separately Managed Account teams. This role will focus on growing and nurturing our client's platform through exceptional relationship-management and services delivery for both new and existing business. The emphasis on this role is its unwavering focus on serving the best interests and mission of our client and their business.

This is an excellent opportunity for an experienced and dedicated advisor seeking a mission-oriented role with future growth potential.

CORE DUTIES & RESPONSIBILITIES

- Cultivate successful, trust-based relationships with the client's accounts and business owners, while identifying and building out new clients through referrals and relationships
- Develop and manage the client accounts, 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 services and advice
- Establish and maintain reciprocal relationships across all Echelon teams and stakeholders

- Prepare and give business reviews to the senior management team regarding progress and roadblocks to establishing new engagements
- Ability to travel approximately 10-15% of the time – within Canada

REQUIRED EXPERIENCE, EDUCATION, SKILLS AND BEHAVIOURS

- 5 years of Investment Advisory experience within an IIROC regulated environment
- Completion of the Canadian Securities Course (CSC), Conduct and Practices Handbook (CPH)
- Must be a Registered Representative in good standing with IIROC – please indicate RR status clearly on resume
- Solid understanding of financial planning for high net-worth clients
- Undergraduate degree (B.A., BASc.) in any discipline
- 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

Application instructions:

To submit your application, please copy and paste this link into your browser https://echelonpartners.bamboohr.com/jobs/view.php?id=11 and click “Apply for this Job”. We thank all applicants for their response but only those considered for an interview will be contacted.