

# Associate to Executive Partner

Harbourfront Wealth Management is an industry leader and a rapidly growing organization that's looking for a passionate and high performing individual to join Hemmett Anseeuw & Associates – a top performing team based out of Winnipeg, MB. This is your chance to play a key role in the future success of our fast-growing organization! The incumbent plays a crucial role in supporting all activities required by the Executive Partner. They must be able to work effectively with other staff members, clients, prospects, and other Partners. The Assistant will report directly to the Team Leader. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

*Our mission at Harbourfront is to bring integrity into the financial planning process and build strong relationships.*

## About Harbourfront

Harbourfront Wealth Management Inc. is an employee owned firm and IIROC registered securities dealer with offices across Canada. The firm specializes in providing holistic wealth management solutions for mid to high net worth individual which includes customized, back tested portfolio construction, financial income and cash flow audits, pension style asset management and tax & trusts solutions.

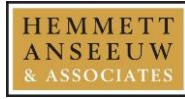
## You will be responsible for:

### Executive Partner Activities

- Actively monitor Executive Partner's calendar
- Use CRM to help Executive Partner build and increase client relationships
- Ensure follow up tasks and requirements are completed regarding client, third party professionals and internal staff
- Monitor Executive Partner's email
- Monitor Executive Partner's phone calls when he is unavailable
- Prepare suitability reviews
- Design and execute plan to support service schedule with scheduled emails and/or phone calls to clients

### Client Meeting & Services

- Review Executive Partner files to ensure readiness prior to client meetings (daily)
- Attend client meetings and record detailed notes as required
- Meet with clients on occasion to complete paperwork
- Produce post meeting summaries as required
- Complete any administrative requirements
- Support Executive Partner's file management
- Complete pre/post meeting task requirements
- Schedule appointments with clients
- Contact clients regarding administrative needs or additional needs
- Contact clients regarding account top ups and contributions annually



### Business Management

- Coordinates insurance requirements with Planning Associate
- Coordinates lending requirements with Planning Associate
- Coordinates portfolio/investment requirements with Investment Associate
- Works closely with Administrative Executive to ensure the Service Matrix is being followed
- Supports Administrative Executive taking calls and initial touches with clients at the office
- Develop and maintain written systems for all activities
- Review, oversee, and manage new account document process

### The ideal candidate for this position has:

- ✓ The knowledge of the securities industry's rules & regulations
- ✓ Canadian Securities or other licensing would be an asset
- ✓ Excellent analytical skills
- ✓ Strong work ethics
- ✓ Excellent interpersonal skills
- ✓ Strong communication skills
- ✓ Excellent organizational and time management skills
- ✓ Professional manner and an extraordinary client service orientation
- ✓ Ability to handle multiple tasks and operate in tight deadlines
- ✓ Self-confidence and self-driven attitude
- ✓ Willingness to adapt, learn, and contribute to the success of Hemmett, Anseeuw & Associates with organization and attention to detail

### If you have any of the following, consider it an asset:

- Experience working with National Bank Independent Network (NBIN) applications

This is an exciting role with great potential for growth. If you are interested in this opportunity, please send an email to: [BTyrchniewicz@harbourfrontwealth.com](mailto:BTyrchniewicz@harbourfrontwealth.com)

*This posting will remain open until a qualified candidate is hired. We sincerely thank all applicants who express an interest in this role but wish to let you know that we will only be contacting applicants that are aligned with our requirements.*

*To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company. Employment is contingent on the satisfactory completion of a pre-employment background check.*