



Investment Advisor Assistant (4+ years of experience)

Harbourfront Wealth Management is an industry leader and a rapidly growing organization that's looking for a passionate and high performing individual to join a top performing team based out of London, ON.

Your role will include providing clients with quality client service with utmost professionalism. The candidate must have meticulous attention to detail, possess a positive attitude and have exceptional interpersonal skills. The successful candidate must be self-motivated and have a desire to grow into greater future opportunities.

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:

- Fostering and supporting client relationships
- Preparing monthly/quarterly/annual reports, client correspondence
- Organising and coordinating all conference calls & webinars
- Coordinating & booking travel arrangements
- Managing the administrative and operational activities of the advisor
- Preparing for client meetings, document preparation, and follow up
- Maintaining client contact management system and internal processes, along with data entry of applications, trades
- Professionally represent advisors to clients, business partners, and the community.
- Adhering to the highest level of integrity, ethical conduct, industry compliance rules, and regulations
- Performing administrative duties as required relating to general office operations
- Carrying out other duties as assigned

The ideal candidate for this position has:

- ✓ Minimum 4 years' work experience in the investment industry
- ✓ IR license with the Canadian Securities Course (CSC) and Conduct and Practice Handbook (CPH) Courses completed
- ✓ Completed a degree or diploma
- ✓ Excellent proficiency with Microsoft Office particularly Word, Excel, PowerPoint & Outlook;
- ✓ Strong analytical and communication skills
- ✓ Strong organizational, multi-tasking and time management skills with the ability to prioritize



HARBOURFRONT WEALTH MANAGEMENT INC.

- ✓ Ability to work in a fast-paced environment and demonstrate a professional and friendly manner
- ✓ Flexibility and willingness to assist others as required
- ✓ Motivation for growth on the team

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

- Experience working with National Bank applications
- In the process of obtaining CFP designation

This is an exciting role with great potential for growth. If you are interested in this opportunity, please send an email to: MSaad@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.