Ultra-High-Net-Worth Consultant/Vice-President

Location: This position may be located in any of our offices in Ontario, Manitoba, Saskatchewan, Alberta, or British Columbia.

Role Description:

Reporting to the Senior Vice-President, Advanced Wealth Planning, the Ultra-High-Net-Worth Wealth Consultant/Vice-President is responsible for the development, execution and maintenance of comprehensive wealth plans, memorandums and goals-based reporting for WA ultra-high-net- worth clients.

Leveraging their significant industry knowledge and experience providing comprehensive wealth solutions to UHNW clients, the Ultra-High-Net-Worth Wealth Consultant/Vice-President will play an integral role in business development, and will provide value-added services to WA Advisory teams and their successful business owner, incorporated professionals and other UHNW clients.

As the Ultra-High-Net-Worth Consultant/Vice-President, you will:

- Cultivate client relationships by meeting with existing and potential clients and completing in-depth fact finding as it pertains to their complex and diverse advanced wealth planning needs or concerns
- Proactively maintain current and in-depth knowledge of all areas of the wealth planning process, including financial, investment, education, insurance and risk management, retirement, tax and wealth transfer planning
- Drive the UHNW WA wealth planning process and continuously look for ways to improve and enhance the UHNW WA client experience
    - Co-ordinate the preparation of an introduction package with an engagement letter, document request and Wealth Questionnaire. Co-ordinate with client's existing tax and legal professionals on behalf of the client for required documents
    - Manage the various UHNW wealth planning deliverables through the process
    - Review UHNW wealth planning deliverables and/or client goals-based reporting relating to specific income tax and wealth transfer topics raised by clients or WA Advisory teams
    - Identify outside assets and referral/Centers of Influence opportunities
- Work in collaboration with Advanced Wealth Planning peers in training and education initiatives with WA Advisory teams on income tax and wealth transfer matters
- Provide expert advice and guidance, to other Advanced Wealth Planning team members when reviewing legal, income tax and financial documentation
- Develop and maintain relationships with Centers of Influence
- Collaborate and work closely with client's other professional advisors in the spirit of delivering a holistic experience
- Recognize and foster UHNW intergenerational wealth management amongst WA Advisory teams and their clients

- Develop and present seminars for WA Advisory teams and their clients on a variety of UHNW income tax and wealth transfer planning topics
- Perform other duties as assigned.

Your education and qualifications include:

- A professional accounting or legal designation
- Completion of the CPA In-depth tax course, CBA Tax Law for Lawyers program, a Masters in Taxation or equivalent is required
- Minimum of 5 years' experience in income tax and wealth transfer planning
- FEA, TEP, CFP, or CLU designations would be an asset
- Fulfill continuing education requirement
- Strong organizational, analytical skills and attention to detail.
- Ability to work independently and as part of a national team whose members have varied of backgrounds and industry experience.
- Exhibit a high level of professionalism that allows clients to feel comfortable discussing personal, confidential information.
- Strong presentational skills
- Desire to keep up to date with Canada's overall economic and financial environment, current events and trends and changes to legislation as it relates to income tax and wealth transfer planning.
- An entrepreneurial spirit to participate in WA continued growth, and a desire to continuously exceed our UHNW client expectations

Conditions of Employment:

- Must be legally eligible to work in Canada.
- A background check, satisfactory to the employer, may be required of the successful applicant prior to commencing employment.

To apply, please submit your application here.

Wellington-Altus 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 the further diversification of our organization are encouraged to apply.

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