CANACCORD Wealth Management

Position Posting

Wealth and Estate Planning Specialist, Wealth Management – Vancouver – Job # 3353

Summary

Canaccord Financial Inc. is a leading independent, full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and global capital markets.

Since its establishment in 1950, Canaccord has been driven by an unwavering commitment to building lasting client relationships. We achieve this by generating value through comprehensive investment solutions, brokerage services and investment banking services for our individual, institutional and corporate clients. Canaccord has 49 offices worldwide, including 32 Wealth Management offices located across Canada. Canaccord Genuity, the international capital markets division, operates in Canada, the U.S., the U.K., China, Hong Kong, Australia and Barbados.

Canaccord Genuity Corp. (Canaccord Genuity), Canaccord's Canadian operations is seeking a motivated individual with excellent organizational and communication skills combined with the ability to prioritize and manage a complex workload to join our team. As an integral member of Wealth Management Services, the role of the Wealth Management Specialist is to increase High Net Worth (HNW) client business by working with Canaccord's Investment Advisors to leverage their time, talents and resources in gathering and maintaining assets of HNW clients. The Wealth Management Specialist will actively promote the benefits of building wealth management practice and will be directly responsible for training, opportunity spotting and revenue generation. This position reports to the SVP, Wealth & Estate Planning Services.

Responsibilities

Framework Support:

- Provide training and support on our Financial Planning software (Framework, provided by Equisoft) to Investment Advisors (IAs) in a one-on-one or group setting;
- Increase advisor use and proficiency of Framework through increased visibility and training.

Internal Call Centre:

- Act as a one stop resource for advisors seeking financial planning information;
- Answer not only basic but also more complex planning questions, around topics such as IPPs, RCAs, and various types of trusts.

Affluent Client Support (Advisory Relationships):

- Simplify complex strategies for advisors to assist with building our affluent and emerging high net worth clients;
- Work with our national team of Wealth and Estate Planning Specialists in:
    - Preparing comprehensive wealth plans to answer advisor/client specific needs or concerns in the areas of financial, investment, retirement, risk management and estate planning;
    - Personalizing each wealth plan to provide expert knowledge around issues affecting emerging affluent clients, such as: holding companies, employee stock options, individual pension plans, retirement compensation agreements, charitable giving, etc.;
- Deliver presentations to advisors and clients on specific topics related to fee based investment solutions, estate planning solutions, and financial planning;

- Maintain ongoing relationships with advisors and their clients in a team context.

Business & Program Development:

- Act as a liaison between advisors, branch managers and the Wealth and Estate Planning Group;
- Work closely with Professional Development in creating and enhancing Advisor Wealth Management Education programs;
- Maintain a high level of partnership and knowledge regarding all of CWM's units;
- Generate ideas and participate in the development of projects that will enhance client service and generate fee based and insurance revenues.

Skills & Qualifications

- Financial planning designation: CFP;
- Experience with planning software: Equisoft & FP solutions preferred;
- Investment and insurance industry knowledge are considered strong assets;
- Five years of relevant experience in all aspects of financial planning; complex financial planning experience is essential;
- Strong presentation skills;
- Ability to work both as part of a team and independently to complete tasks;
- Effective communicator with excellent written and oral communication skills.

Qualified applicants are invited to submit a resume and covering letter including salary expectations. All applications will be held in strict confidence.

Please e-mail your application to Human Resources at **careers@canaccord.com.** We ask that all applicants send their resume in a MS Word document quoting **job # 3353 and title in the subject line**. In order to be considered for employment at Canaccord, candidates selected for interviews will be required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. No phone calls please. Thank you for your understanding.