Wealth Planner
Full Time | Brownstone Asset Management

Brownstone Asset Management was founded in 2003 in Calgary Alberta, by professionals with a significant track record in the business of creating wealth through conservative investment practices. We are an Alberta based, investment management firm that caters to select high net worth Individuals, Foundations, and Trusts.

The firm is focused on the growth of capital through a conservative proven investment philosophy, where dividend-producing investments provide the portfolio foundation for wealth creation, yet a select set of small and mid-cap holdings are included to boost growth prospects.

We are seeking an enthusiastic and bright individual who is eager to learn, independent, motivated, and interested in being part of a great team.

We are a people first organization. Our people are expressive and candid communicators who respect the opinions of others as part of challenging the status quo. Our people are focused and disciplined with a practical approach and the tenacity to make our aspirations become reality.

If all of this resonates for you, we would love to learn more about you through a cover letter and resume.

JOB DESCRIPTION

POSITION TITTLE: Wealth Planner
MAIN FUNCTIONS: Providing comprehensive financial planning advice and support to Brownstone clients and act as the in-house wealth planning expert to support the team.
REPORTING TO: Vice President Capital Markets
COMPENSATION: Salary and incentive programs will be negotiable and based on qualifications

## Qualifications

The successful candidate will have:

- Completion of post-secondary program.
- Accredited financial planning designation (CFP, RFP, PFP)
- Minimum of 5 years of experience as a high-net-worth financial planner

Desirable qualities:

- TEP designation
- Life Insurance license
- Professional designation (CPA, CA, CMA, CGA, CFA, LLB)
- Canadian Securities Course
- Additional estate and/or tax courses

## Accountabilities

Some of your duties for Brownstone Asset Management will include (but may not be limited to):

- Responsible for delivery of end-to-end goals based financial plans by:
    - Gathering key pertinent data and information about the client through deep discovery
    - Preparing, analyzing and reviewing the financial plan using a software tool and client focused executive summary to ensure that it is congruent with the client's specific needs
    - Presenting the financial plan and related strategies
    - Identifying opportunities to deepen the relationship and drive business results.
    - Act as subject matter expert and champion for financial planning as a key service available as part of the Brownstone Asset Management full service offerings
    - Provide ongoing professional financial planning advice on complex strategies

- Fostering and encouraging client focused Portfolio Managers and Relationship Managers to incorporate financial planning in their business model.
- Championing the value, benefits and outcomes of financial planning to both advisors/RMs and clients.
- Collaborating with internal colleagues and external partners (including taxation, insurance consultants, will and estate planners, philanthropic group) to ensure there is an integrated and organized approach to financial planning
- Maintain financial planning professional practice standards and internal service level agreement.
- Remain current on all financial planning related topics
- Following standard procedures, best practices and professional codes of conduct in regards to client engagements.
- Maintaining a high level of customer service
- Facilitating a culture of open and honest communication
- Encouraging the generation of new ideas and approaches