

# CLIENT PORTFOLIO MANAGER

ACTIVE MANAGEMENT IS BEING CHALLENGED.

JOIN OUR TEAM AND HELP US PROVE ITS MERIT.

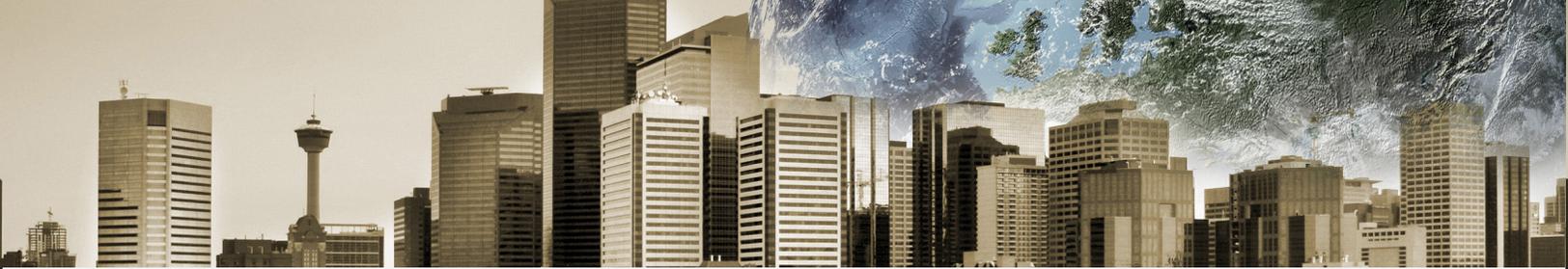
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## ABOUT OUR FIRM

With a 17-year history, \$1.2 billion of assets under administration, and a team of 23 professionals, McLean & Partners Wealth Management is one of the premier wealth management firms in Western Canada.

At McLean & Partners, we take a measured and long term approach to investing. We obsess over the fundamentals of the businesses in which we invest, and are not afraid to make out-of-consensus calls to create wealth for our clients. Our clients have entrusted us with their financial well-being - we do not take this trust lightly. This fundamental approach also extends to our client relationships. We have a fundamental understanding of the needs of these high net-worth individuals, because we take the time to develop and nurture closer relationships with them to better understand what their future holds. Only then can we provide our clients with customized investment solutions that fit their unique needs and goals.

McLean & Partners is proud to be an independently managed and operated subsidiary of the Canadian Western Bank Group (CWB). Our vision is to be the wealth management company of choice for all stakeholders, and the nature of our relationship with CWB allows us to work towards achieving this goal. Operating independently provides us with the flexibility and freedom to execute upon our strategic plans; while having the backing of CWB lets us reach a significantly larger client base across Western Canada. Working together ensures that both McLean & Partners and CWB can continue to grow our businesses, and our clients' wealth, well into the future.



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## OUR PRIVATE CLIENT TEAM AND YOUR ROLE

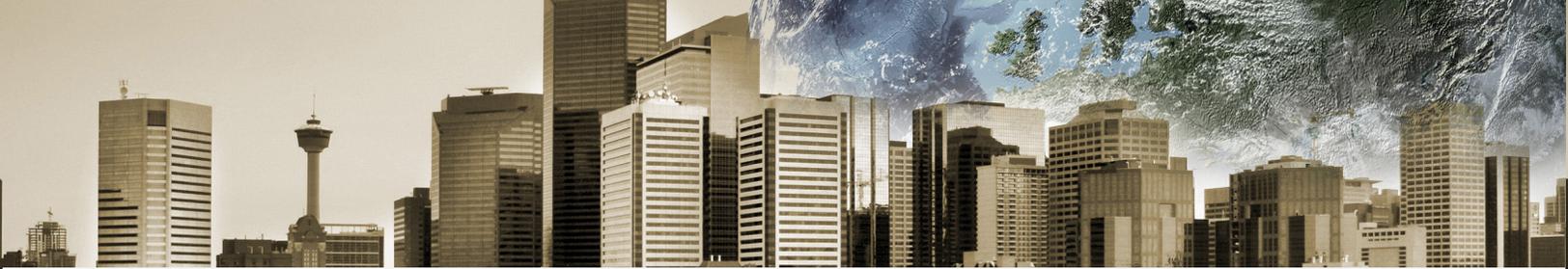
We are looking for someone who has an obsessive passion for client care, relationship building, and providing counsel and direction to high-net-worth clients, on a wide range of wealth management and investment issues. Our 'team-of-teams' approach allows us to deliver a level of client service that has a reputation of its own. Our Private Client Team consists of three investment professionals, supported by a team of four client-service associates. Proactive service and customized communication are important and fundamental hallmarks of our overall client-service model.

The ideal applicant will be responsible for building and maintaining existing relationships with high-net-worth clients with portfolios in excess of \$1,000,000. The right individual will also have a passion for financial markets, with strong business development and client relationship skills. The focus will be to advise clients and construct client portfolios through McLean & Partners Private Pooled Strategies, and individual segregated holdings.

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## CRITICAL DUTIES AND RESPONSIBILITIES

- Alignment of your personal investment philosophy with McLean & Partners' investment philosophy and process
- Developing authentic relationships with clients, by providing outrageous levels of service and care, and leveraging the results through effective client referrals
- Responsibility for achieving business development and new asset targets
- Assisting clients with identifying their investment objectives, and designing investment programs using McLean & Partners' investment solutions



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- Effectively communicating the firm's remarkable investment philosophy, ensuring that clients feel comfortable, and understand their investment program
  - Participating in the firm's investment committee and communicating with our Research Team

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## DESIRED SKILLS AND EXPERIENCE

- The ability, passion, and skills to develop new business, and attract new assets to the company through various proprietary approaches and distribution channels
- A proven track record of successfully building wealth management relationships with clients
- Strong client service skills, commensurate with the expectations of high-net-worth clients
- Strong communication skills and the ability to work productively within a team and ownership culture
- Broad knowledge of investment products, portfolio management, and asset allocation
- Graduation from University, and completion of the Canadian Securities Course
- Industry certifications such as the CIM or CFA are an asset, however, full completion is not required

Reports to: Kevin Dehod, President & CEO



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## COMPENSATION

We offer a compensation structure consisting of three elements: base salary, quarterly trailer, and a new asset bonus. The base salary will be based on industry experience and corporate responsibilities.

We are an evolving and entrepreneurial private investment firm, and we believe that a key to achieving our vision is employee ownership in the firm. As a key cultural driver, and with the full support of our partner company, Canadian Western Bank, we are happy to offer equity ownership to those individuals that help us achieve our vision.

We encourage interested applicants to review our website and explore McLean & Partners online at [www.mcleanpartners.com](http://www.mcleanpartners.com).

Applicants should send their résumé and cover letter to [humanresources@mcleanpartners.com](mailto:humanresources@mcleanpartners.com).