

Senior Client Advisor/Portfolio Manager

Position Summary:

Ideal applicant will be responsible for building and maintaining existing relationships with high net worth clients with portfolios over \$1,000,000. The individual will also have a passion for financial markets with strong business development and client relationship skills. The individual will be client focused, advising clients and building client portfolios through Mclean & Partners internal private pooled funds and individual segregated holdings.

Responsibilities and Requirements:

- Develop deep relationships with clients by providing superior service and leveraging this result through effective client referrals,
- Proven track record of successfully building wealth management relationships with clients,
- Strong customer service skills to commensurate with the expectations of high net worth clients,
- Broad knowledge of investment products, portfolio management, and asset allocation,
- Assist clients with identifying their investment objectives and design an investment program utilizing the investment solutions of McLean & Partners,
- Effectively communicate the firm's investment strategy and ensure the clients feel comfortable and understand their investment program,
- Participate in the firm's investment committee and communicate with the research team,
- Strong communication skills and the ability to work productively within a team and ownership culture,
- University Degree and Canadian Securities Course
- Industry courses such as the CIM, CFP, and CFA is an asset, however full completion is not required



Reports to: Kevin Dehod, President & Portfolio Manager

Compensation: Base salary, plus Bonus. Base Salary based on industry experience, bonus potential is based on ability to meet and exceed individual, team, and corporate goals.

As a growing entrepreneurial private client investment firm, our vision is to be the most respected high net worth private client investment firm in Canada. We are pleased to offer equity ownership to those individuals who participate in our vision.

We encourage interested applicants to review our website and explore the McLean & Partners family online at www.mcleanpartners.com

Applicants should forward their resume with cover letter to:
humanresources@mcleanpartners.com