Steadyhand

Steadyhand Investment Management is an employee-owned Canadian investment management company whose mission is to help Canadians build their wealth through a better, more human experience. For more information, see https://www.steadyhand.com

***Job Description: Advisor (Toronto)***

Responsibilities:

As a boutique firm, we are looking for employees who share our passion for creating a top-tier investment experience for all Canadians, and who are aligned with our investment and client service philosophy. We are an organization that respects everyone's input and values teamwork. Employees must be flexible as to their job duties and time commitment.

This is a diverse role involving many facets of our business. The team member will initially be expected to perform the following duties:

- Advise clients across Canada about Steadyhand products via the phone, video-conference, e-mail, and in person meetings.
- Partner with our Chief Development Officer to build our profile in Ontario and to promote the firm to potential clients and centres of influence.
- Meet with prospective clients and share knowledge of Steadyhand's products, services and research.
- Assist in onboarding of new client account application forms and other documentation.
- Conduct ongoing client review meetings and discussions to achieve solutions on unresolved issues.
- Maintain a working knowledge of capital markets.
- Contribute to a positive work environment and help back-up other team members on other duties.
- Help organize and participate in client events (e.g., seminars, webinars, and other events).

This is a permanent, full-time position located in Toronto. On average, we anticipate that you will be in the office a minimum of three days per week, while the remainder can be at home if desired.

The Candidate:

Candidates should possess the following attributes and skills:

- Passionate about client service – willing to go the extra mile for the client.
- 5 years' experience providing excellent client service and investment advice to individual investors.
- Proven ability to deliver a high level of client service while dealing with all different types of clients.
- Excellent listener with a high level of Emotional Intelligence.
- Personable, approachable and outgoing.
- Possess outstanding written and verbal communication skills.
- Technology savvy.
- Maintain up to date knowledge of regulatory and compliance environment.
- Independent and self-motivated to achieve goals.
- University degree, Community College Diploma or equivalent industry experience.
- Completion of either Investment Funds in Canada (IFC) or Canadian Securities Course (CSC).
- Dedicated to building a career in the wealth management industry.

Individuals meeting the criteria above are encouraged to submit their resume to Irene Gilligan by emailing their resume and cover letter to irene@gilliganassociates.com. While we thank all candidates for their interest, only selected individuals will be contacted for follow-up.

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