

Stonegate Private Counsel LP

Job Type: Full Time

Location: Halifax, NS, CANADA

Job Category: Securities, Financial, Wealth Planning

Company URL: www.stonegatepc.com

Post Date: October 1, 2009

POSITION:

Portfolio Manager & Wealth Planner – Atlantic. This role will be based in Halifax, with minimal travel.

REPORTS TO:

Managing Director, Atlantic Region

PRIMARY OBJECTIVE:

Work with firm Principles and clients, to develop, implement and manage the Investment Policy process and discuss portfolio performance. Facilitate the production of various Wealth Plans (Financial Analysis, Risk Management, Tax and Financial Strategies, and Wealth Transfer).

RESPONSIBILITIES:

- Build and strengthen relationships with clients to ensure their satisfaction with the Investment Management and Wealth Planning services
- Respond to client queries regarding portfolio performance
- Meet with clients regularly and review quarterly portfolio performance
- Collect and organize client documentation and work with Stonegate's central Wealth Planning Group
- Prepare and assist with the preparation of complex financial plans and coordinate with subject matter experts in the Wealth Planning division.

QUALIFICATIONS:

Education:

- University degree in business or related discipline
- A CFP or CLU designation or relevant background experience in accounting or legal.
- A CFA Charter or minimum completion of the CFA Level 1 exam plus the CIM designation, plus experience in research and financial analysis of securities. . Current or previous registration with any provincial Securities Commission as an Associate Advising Representative or Advising Representative is an asset

Experience:

- Financial Services experience in a client facing role
- Investment Management experience
- Knowledge of wealth planning concepts – Financial Analysis, Risk Management, Tax and Financial Strategies, and Wealth Transfer
- Minimum five years in client services or sales experience within the financial area, or comparable experience

Knowledge, Skills and Abilities:

- Exceptional organizational skills is a must (service to clients is paramount)
- Superior verbal and written communication
- Demonstrated excellence in client service
- Ability to interact effectively with various types of people (external portfolio managers, advisors, assistants, clients)
- Solid understanding of discretionary portfolio management and the securities industry
- Ability to understand and interpret financial/investment issues related to financial planning, wealth management and tax planning
- Strong analytical and problem solving abilities
- Experience with Financial Planning Software would be an asset
- Experience with standard desktop software including Excel, etc.
- Ability to effectively prioritize multiple skills
- Ability to work effectively in a team environment
- Ability to work with minimal supervision

ABOUT STONEGATE

Stonegate Private Counsel LP is a partnership of experienced professionals who provide a unique wealth advisory experience for some of Canada's wealthiest individuals and families. Our heritage traces back to the early 1980s when professionals at two respected Canadian investment firms recognized that the financial industry was becoming too complex and impersonal. They decided to create a company that would provide a broader, more integrated suite of services delivered from a single source.

Our distinctive offering as a specialty advisory boutique is backed by the global resources of CI, one of the largest and most respected financial services firms in Canada. Stonegate's parent company, CI Financial Corp. (TSX: CIX) is a diversified wealth management firm and a true success story. Since its founding over 40 years ago, CI has grown into one of the top three firms in its industry, with approximately \$50 billion of assets under management and approximately \$80 billion of fee-earning assets.

We offer exciting and challenging career opportunities, with competitive compensation, an attractive benefits package and opportunities for professional development and growth. If you are interested in joining our dynamic group of professionals, please submit your resume in confidence to vrafuse@stonegatepc.com

We appreciate your interest. However, only those under consideration