ASSOCIATE, CLIENT PORTFOLIO MANAGEMENT TEAM

Helping people make their world better by delivering solutions and an experience that exceeds client's expectations.

ABOUT OUR FIRM

Since our beginning in June of 1999, CWB McLean & Partners has put clients at the heart of everything we do. We focus more on our client's success than that of the firm's, and our approach to serving our clients beyond being "just a number on a spreadsheet" remains unchanged. CWB McLean & Partners has a team of 26 dedicated professionals and manages over $1.3 billion in assets.

As a part of the CWB Wealth Management Team, we draw on each other's breadth of experience, knowledge, and support to deliver the best solutions for our clients. CWB Wealth Management's majority ownership in CWB McLean & Partners gives us strength in operations, and allows us to broaden our financial service offerings. We are also sub-advisors of the CWB Onyx Mutual Funds.

OUR CORES

In order to successfully execute on our vision of becoming the wealth management company of choice, we seek individuals whose values are aligned with the core character of our company (CORES):

CONTINUOUSLY IMPROVE

We commit to constant learning to perpetually improve ourselves, our processes, and the results we deliver. Our "never-stop-learning" approach includes embracing both successes and bumps in the road as learning experiences.

OWN IT

We operate with unmitigated transparency and honesty, we take personal responsibility and accountability for our commitments and actions.

REFUSE TO GIVE UP

We are disciplined and resilient in our approach.

EXCEL TOGETHER

We draw collaboratively on our collective strengths to operate as an effective team.

SEEK THE TRUTH

We strive to make insightful decisions, based on a thorough understanding of the facts.

CWB McLEAN & PARTNERS WEALTH MANAGEMENT

YOUR ROLE

We are looking for someone who is obsessed with client care, relationship building, and providing counsel to high-net-worth clients on a wide range of wealth management situations. Our Private Client Team consists of three Client Portfolio Managers, one Investment Advisor, and five Client Service Associates. Proactive service and customized communication are fundamental hallmarks of our overall client service model.

As a member of the Client Portfolio Management Team, you are seeking to become a registered Client Portfolio Manager within 36 months and to build a book of business under the supervision of an assigned Client Portfolio Manager. You will be given the opportunity to learn from a seasoned team of experienced professionals that have managed private client relationships for over 20 years and over time, you will be allocated client relationships from our existing client base.

While this role will involve an allocation of an existing client base, the expectation is for significant individual business development with the support of our team. The first year will entail focusing on business development and learning under the guidance of the team to ensure you are well prepared to manage client relationships and able to grow the business.

CRITICAL DUTIES AND RESPONSIBILITIES

- Create and execute a business development plan with the help of a Client Portfolio Manager.
- Allocate 50% of your time to business development activities for the first two years of this role.
- Able to execute on business development pillars and achieve new asset targets.
- Develop authentic relationships with clients by providing personalized & exceptional care, and able to leverage the results through effective client referrals.
- Collaborate with the CWB Wealth Management team on best practices and provide referrals to the select experts in financial planning and banking services within the CWB Financial Group.
- Show curiosity for learning as it relates to the firm's investment process and how the team makes investment decisions.
- Effectively communicate the firm's unique investment philosophy,

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ensuring that clients feel comfortable and understand their investment program.

- Ongoing monitoring and management of client portfolios and asset allocation, primarily utilizing the seven CWB McLean & Partners Private Investment Pools.
- Effective collaboration with our marketing & communications team to ensure proactive and successful client and business development communication and initiatives.

DESIRED SKILLS AND EXPERIENCE

- The passion and skills to attract new assets to the company through various proprietary approaches and distribution channels.
- A proven track record of successfully building relationships with clients.
- Experience with being successful in business development.
- Strong client service and communication skills, commensurate with the expectations of high-net-worth clients.
- Knowledge of investment products, portfolio management, and asset allocation.
- Graduation from university.
- Registration with IIROC as a Registered Representative, or ability to fulfill this expectation within 6 months of date of hire. This involves completion of the required licensing courses; Canadian Securities Course, and the Conduct and Practices Course – both administered by the Canadian Securities Institute.
- Industry certifications, such as the CIM or CFA are an asset, however, full completion is not required.

Reports to: Russ MacKay, Founder and Client Portfolio Manager.

COMPENSATION

We offer a competitive base salary and benefits plan, based on industry experience and the responsibilities of the position. We also offer a bonus program based on new assets closed and achievement of business development targets. There is potential for equity ownership over time to those who excel in our culture and help us achieve our vision.

We encourage interested applicants to explore CWB McLean & Partners online and to review our website at www.cwbmcleanpartners.com. Applicants should send their résumé and cover letter to humanresources@cwbmp.com.