

Associate Financial Advisor – March 2026

Greenfeld Financial Management is an independent wealth management firm located in South Delta, BC and has been in business for 32 years. We provide insurance, loans/banking and other referral products for residents in BC and Alberta. Jeffrey Greenfeld, the owner, provides investment management through Greenfeld Wealth Management and is licensed with iA Private Wealth Inc., a member of the Canadian Investor Protection Fund and the Canadian Investment Regulatory Organization.

POSITION SUMMARY:

The Associate Financial Advisor's primary focus is to proactively grow the Assets Under Management (AUM) for the branch office by attracting new clients as well as maintaining relationships with existing clients. The Advisor will assist clients in securing their financial goals by reviewing their investment objectives and risk tolerance while recommending suitable wealth management solutions that reduce risk through disciplined rebalancing. The job requires commuting to our office in South Delta.

ACCOUNTABILITIES:

Provides a high level of client service by:

- Preparing, analyzing, and presenting reports and recommendations
- Assist the Senior Wealth Advisor (SWA) in developing investment plans
- Working with the Bus. Dev. Mgr. to develop client communications and marketing pieces
- Responding to client requests, inquiries, and concerns promptly and efficiently
- Offering clients sound investment advice that align with their investment objectives
- Adhering to regulatory policies by staying up to date with all industry rulings and policies
- Ensuring all client interactions are accurately documented

Generates sales or revenue by:

- Identifying new business opportunities to acquire additional assets and/or increase revenue
- Establishing targeted revenue levels for each segment of the book
- Using in-depth knowledge of products and services to identify new opportunities within the existing client base
- Ensuring investment recommendations are suitable and align with client's financial goals, objectives and risk tolerance
- Maintaining a good understanding of client profiles and corresponding investment strategies
- Managing the execution of transactions on behalf of the SWA
- Ensuring non-solicited trades meet the client's risk tolerance

Contributes to the success of the team by:

- Actively participating and contributing to team meetings
- Encouraging the generation of new ideas and business processes
- Sharing knowledge and experience to enhance the development of all team members
- Exhibiting commitment to grow into a highly trained advisor
- Assisting the SWA in the creation, preparation and presentation of business plans

QUALIFICATIONS:

- Minimum 3-5 years' experience in the financial industry
- Knowledge of mutual funds and asset allocation and portfolio management
- Working knowledge of investment and retirement planning sufficient to meet the needs of clients and to compete for business within the current market
- Strong organizational skills and ability to meet deadlines and targets
- Ability to take initiative and work independently
- Understanding of industry and firm compliance regulations
- Experience with financial planning tools and client management tools such as Maximizer CRM, Croesus, Compass, iMost, Next Rep is an asset (but not required)
- Excellent written and verbal communication skills
- Insurance license an asset (but not required)

Education and Accreditations:

Must be licensed as a Registered Representative (RR) or in the process of obtaining their license. This includes:

- CIRE (Canadian Investment Regulatory Exam)
- Retail Securities Exam
- A relevant diploma or degree from an accredited post-secondary institution, or minimum four years of relevant experience

HOW TO APPLY

Email your resume and a cover letter to karen@greenfeldfinancial.com.

Address the following in your cover letter:

- What are your long-term personal & career goals?
- Explain what you're doing now for a job and why you're looking elsewhere.
- If you don't have one, explain why.
- Tell us what motivates & inspires you.
- When not working, what does your leisure time look like?
- Compensation expectations.

4877 Delta Street, Delta, BC V4K 2T9
604.940.8617