

## Portfolio Manager (Investment Advisor)

Alitis Investment Counsel  
Victoria, BC

Alitis Investment Counsel is actively searching for a licensed Portfolio Manager (Investment Advisor) to join our Victoria office.

We are looking for a dynamic self-starter who possesses a genuine passion for building long-lasting relationships based on integrity and outstanding client service. If you are someone who enjoys public speaking and networking and can skillfully identify opportunities to grow Alitis' client base, we encourage you to apply.

Your exceptional communication and relationship management skills will enable you to professionally represent the Alitis brand and foster team engagement.

In this pivotal role, you will be responsible for growing our private client business in Victoria and southern Vancouver Island. Not only will you expand our center of influence (COI) referral networks, but you will also actively seek to build new private client relationships.

As a lifelong learner, you will stay updated with industry trends and best practices, continuously enhancing your expertise to better serve our clients and contribute to our team's growth and success.

Team engagement will be at the core of your approach, collaborating with colleagues to achieve collective goals and create a supportive, innovative environment within our organization.

### The responsibilities of this role encompass:

- Sourcing qualified prospective private clients in the Victoria and Southern Vancouver Island area.
- Developing and maintaining a strong Alitis presence within the local professional and business community.
- Recommending investment strategies in line with client return objectives and risk tolerance.
- Providing ongoing service for new and existing clients in accordance with Alitis' client service standards and regulatory requirements.
- Spotting opportunities and initiating conversations regarding holistic planning for clients, including estate planning, retirement income needs and other wealth planning services.

### The candidate will be:

- Self-motivated and skilled at relationship management and business development.
- Registered as either an Investment Advisor, Associate Portfolio Manager or Portfolio Manager.
- A team player willing to contribute to building Alitis' brand and assets.
- Positive, collaborative, and conducts themselves with integrity in everything they do.
- Experienced with Microsoft Office Suite and Salesforce is an asset.

Preference will be given to candidates who currently have an established book of business and have confidence that they will retain those assets as they transition to Alitis solutions.

## Opportunity to Own Equity

We understand that your success is directly linked to the success of the firm, which is why employees share in the growth and profitability of the organization. By owning equity, you become an integral part of our long-term vision and have the potential to benefit financially from the collective success we achieve together.

## Competitive Compensation

We recognize and reward the exceptional contributions of our team. Remuneration consists of a base salary, a generous compensation structure for new client assets brought into the firm, a team bonus, and a comprehensive group benefits program, which includes an employer-funded group RRSP.

## Collaborative Environment

We believe in the power of collaboration. Our team-based approach encourages our Private Client Advisory Team to share ideas, best practices, and insights, fostering a vibrant learning environment. By collaborating with colleagues who have expertise in various areas of wealth and investment management, you'll have the opportunity to broaden your skill set, deepen your knowledge, and provide your clients with sound advice.

## About Alitis Investment Counsel

Providing endowment style portfolio management, coupled with comprehensive wealth planning services, is the core offering of the firm. Our team of professionals operates with an entrepreneurial spirit that is client focused and team based. Client testimonials and excellent client retention rates demonstrate that our relationships are enduring and a hallmark of the Alitis brand.

We are an Island-based and employee-owned discretionary portfolio management firm with offices in Campbell River, Comox, and Victoria. Alitis takes a holistic approach to wealth management and financial planning services. With a team of highly experienced Portfolio Managers, Financial Planners, and Insurance specialists, Alitis has established a solid track record of success as both an independent Portfolio Manager, and as an Investment Fund Manager.

Alitis is an equal opportunity employer. We are committed to creating a diverse environment. All applicants will receive consideration for employment without regard to race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, or age.

In order to be considered for this significant opportunity, please submit a resume and cover letter outlining your relevant experience to [careers@alitis.ca](mailto:careers@alitis.ca) by **August 25<sup>th</sup>, 2023**.

*We thank all those who apply; however, only shortlisted candidates will be contacted.*