

Licensed Portfolio Manager

Full-Time | Permanent | In Office

Who We Are

Alitis is an Island-based, employee-owned discretionary portfolio management firm providing endowment-style portfolio management and comprehensive wealth planning services. Our team operates with an entrepreneurial, client-focused, and team-based spirit. Client testimonials and excellent retention rates reflect the enduring relationships that are a hallmark of the Alitis brand. With offices in Campbell River, Comox, and Victoria, we take a holistic approach to wealth management, supported by experienced Portfolio Managers, Financial Planners, and Insurance Specialists.

The Opportunity

Alitis Investment Counsel is actively seeking a dedicated team member to join our Comox, BC office.

The Portfolio Manager at Alitis is a client-focused trusted advisor responsible for delivering exceptional financial planning and investment management services. This role combines outstanding relationship management and effective business development to create comprehensive strategies tailored to client goals, including retirement, tax optimization, and estate planning.

With a strong foundation in compliance and a commitment to integrity, this individual plays a key role in strengthening client relationships and driving the continued growth of Alitis.

Responsibilities

- Provide exceptional service for new and existing Alitis clients in accordance with Alitis' client service standards.
- Provide basic financial plans for clients, including simple retirement planning, tax considerations, and estate planning.
- Ensure compliance with all regulatory requirements, including Know Your Client (KYC) and Know Your Products (KYP) obligations.
- Proactively source and engage qualified prospective clients.

- Develop and maintain a strong Alitis presence within the local professional and business community.
- Actively participate in business development activities on a regular basis, including hosting community events, preparing presentations, etc.
- Design and manage client portfolios in line with return objectives and risk tolerance using Alitis investment pools.
- Maintain and strengthen Alitis client relationships through regular quality communication.
- Mentor and support entry-level portfolio managers.

Experience and Qualifications

- Minimum 5-10 years of experience in a similar role, preferably with a high degree of client-facing roles and responsibilities.
- Certified Financial Planner.
- Chartered Investment Manager (CIM) or completion of CFA Level 1.
- Sufficient investment management experience to qualify for Portfolio Manager registration (Advising Representative or Associate Advising Representative, as per regulatory requirements.)
- Preference will be given to candidates who are licensed for life, sickness and accident insurance.
- Preference will be given to candidates who bring a transferable book of business. Compensation arrangements will be structured to recognize and reward these contributions.

Key Competencies

- Self-motivated and skilled at relationship management and business development.
- A team player willing to contribute to building Alitis brand and assets.
- Positive, collaborative, and conducts themselves with integrity in everything they do.
- Experience with Microsoft Office Suite is required. Salesforce or CRM proficiency will be considered an asset.

Compensation and Benefits

- Annual salary of \$120,000 – \$150,000 commensurate with experience.
- Four (4) weeks' vacation plus flex days and additional time off for holiday office closure.
- Quarterly commissions earned on new assets brought to the firm.
- Employer-funded group RRSP.
- Comprehensive group benefits program.

How to Apply

Sound like a fit? Send your resume with your name + *Portfolio Manager* in the subject line to **careers@reimaginework.ca**.

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.

We thank all candidates for their applications; however, only shortlisted candidates will be contacted.

Please note that we are unable to provide any sponsorship or support work visas of any kind at this time. Applicants must be able to work in Canada for any employer in a full-time, permanent capacity without sponsorship.