

Investment Adviser - Portfolio Manager

Alitis Investment Counsel, an Island-based Portfolio Manager and Investment Funds Manager, has an immediate opening for a Private Client Investment Professional for our Campbell River, BC office.

Since our inception in 2009, Alitis has established a solid track record of success as both an independent Portfolio Manager servicing BC and Alberta and as an Investment Funds Manager specializing in alternative investments (with a focus on real assets such as private mortgages and private real estate). Providing endowment style portfolio services, coupled with best in class wealth planning services, is a top priority of the firm. With an internal team of Portfolio Managers, Financial Planners, and insurance specialists, Alitis offers full service investment management and financial planning services.

The ideal candidate will have:

- **a Securities licence and has or is in the process of obtaining their CIM or CFA designation**
- **a CFP or other Financial Planning designation**
- **a minimum of three years experience with direct, full-service delivery of investment advice, with a basic financial planning overlay**
- **Life licensing or LLQP completion would be an asset**

In this role the successful candidate will work to provide exceptional service to a group of existing clients as well as develop new business in the North Vancouver Island region. Candidates who currently own a book of clients are encouraged to apply.

Although Alitis Advisers do not own their book of business, they are responsible for and are generously compensated for the clients they service, including commissions for all new client assets brought into the firm.

Compensation consists of a base salary, commissions on new AUM, a team bonus and a comprehensive group benefits program, including an employer-funded group RRSP.

Alitis is a 20-person team of professionals who operate with an entrepreneurial business attitude that is client-focused and team-based. Our client relationships are enduring and are a hallmark of our brand.

Please send your resume or inquires to ehofmann@alitis.ca with **Campbell River Adviser** in the subject line, along with a personalized cover letter outlining your personal strengths and experience that will contribute to your success in this exciting position.