Explore a rewarding career with **KBH CHARTERED PROFESSIONAL ACCOUNTANTS (KBH)**, a leading Accounting and Advisory firm rooted in Alberta, with offices in both Edmonton and Provost. Our comprehensive services are crafted to address the unique financial and consulting needs of our clients' owner-managed businesses.

As a standout player in the Edmonton market, we pride ourselves on upholding Core Values of Service, Relationships, Integrity, Efficiency, and Innovation, aligning with our Core Purpose of "Helping People Succeed."

We are currently seeking a full-time **Wealth Advisory Associate** for our **Edmonton** office. We are looking for someone who is motivated, outgoing and positive, with the ability to work independently and within a team environment. The successful candidate must have exceptional internal and external client service and relationship building skills. This individual will work alongside our Wealth Planner and report to our Wealth Advisory Partners.

Who are we?

We are a mid-sized firm located on the south side of Edmonton. We believe that our people perform best when we set them up for success and we provide the resources and support they need to help them achieve their personal goals, while working towards the firm's goals.

- 13 partners and just over 50 staff
- Service over 2,000 businesses and organizations
- Mix of audit, review, compilations, various tax valuations and special engagements
- Team environment where students engage in experiential learning
- Opportunities to provide creative and innovative solutions to our clients and the firm
- Hands-on experience with opportunities to interact with partners, managers, and clients on a regular basis

What will your role look like?

Responsibilities for this role include:

- Maintaining a high level of confidentiality and discretion
- Onboarding of clients into KBH Wealth Advisory
- Assisting in the preparation of financial plans
- Providing professional support to clients and assisting them with their requirements
- Collaborating with and supporting the Wealth Advisory team
- Understanding and maintaining knowledge of planning software
- Participating in firm initiatives and projects
- Attending client meetings when required
- Additional duties as required

What will you bring to the role?

The successful candidate must have:

- 1-2 years experience with investment management and a financial services background
- A University or College Bachelor's degree, or equivalent experience
- Experience in a client-facing role with the opportunity to provide financial advice
- Exceptional multi-tasking, organizational and time management skills
- Strong written and oral communication skills with excellent attention to detail
- Proficiency in MS Office with intermediate to advanced knowledge in MS Excel
- Knowledge of Conquest or similar financial software would be an asset

- Experience working in a Professional Services environment would be a definite asset
- Canadian Securities course and/or life insurance licensed considered an asset

Why is KBH the right fit for you?

We believe that if you find the right fit, you are already on your way to success. Here are some of the reasons why KBH is the right fit for you:

- Performance reviews every six months
- Annual salary reviews that are competitive with the industry
- Summer Fridays off in July and August
- Free parking
- Employer paid extended health and dental benefits, with several tiers to choose from (including options for Health/Wellness Spending Accounts)
- Life Insurance and Disability Coverage
- 3 weeks' vacation to start (prorated your first year)
- Paid Personal Leave
- Monthly "perks" from our social committee

How do you apply to KBH?

Now that you know what a great place KBH is, it's time to apply! Email your cover letter, resume and salary expectations to Human Resources at apply@kbh.ca. Applications will be accepted until a suitable candidate is found.

Please visit our website at www.kbh.ca/wealth-planning/ to learn more about our firm and our team. We thank all applicants in advance for their interest, however only those candidates selected for an interview will be contacted.