Position Profile

Senior Associate

The Company

Northwood Family Office is an independent, privately-owned boutique family office which provides comprehensive Net Worth Management™ to wealthy Canadian and global families. Northwood clients have significant family net worth, typically in the $10 - $500 million range. The firm acts as a Personal CFO or Chief Advisor to client families using a dedicated team of professionals who oversee and manage their complete financial affairs. Northwood Family Office is Canada's leading independent multi-family office and has consistently been ranked the '#1 family office in Canada' in the *Euromoney* Global Private Banking survey. For more information, see our website at www.northwoodfamilyoffice.com.

The Position

Northwood Family Office is currently seeking a Senior Associate to expand the firm's client management team. There are two components to the role:

1. Client management – assist the client management team with analysis and projects as required.
2. Investment and Tax planning – contributing to the firm's proficiency in investment research and tax planning including development and/or review of client strategies, as well as other related projects.

Description of the Role

The individual will be primarily responsible for the following:

- Assist in the management of client relationships
- Undertake tax, investment, and other planning related work for clients
- Prepare analyses and reports related to individual client situations
- Contribute to the firm's overall knowledge on investment, tax and planning issues
- Assist in the management of recurring investment, tax and accounting needs for clients

Skills and Experience

The role is ideally suited for a CFA, or CPA, CA with 5+ years of post qualification experience who is looking to build a career in the wealth management industry, rounding out their existing skills with additional complimentary knowledge. The successful candidate will possess the following skills and experience:

- CFA, or CPA, CA accounting designation
- Knowledge and experience in the areas of investment management and tax (personal, trust, and corporate)
- Strong interpersonal skills, and ideally a history of client relationship management
- Strong technical skills
- Excellent written and verbal communication
- Excellent computer skills (Microsoft Office)
- Strong organizational skills
- Self-starter, high level of initiative, can work independently
- Ability to work as a member of a team
- Desire to acquire unique skills and build a long-term career
- Ability to integrate quickly and add value
- Priority will be given to candidates with High Net Worth client and investment experience

Compensation

Salary and bonus will be dependent on the skill set, experience and perceived potential of the candidate.

Contact

We thank all applicants in advance for their interest, however, only those selected for an interview will be contacted. Please forward resumes to the attention of Eric Weir via Lisa Fabregas at lf@northwoodfamilyoffice.com.