First Affiliated Holdings Inc.
Family Office Director

Does this describe you?

You're brilliant. You're able to help people with complex financial situations by coming to an understanding of what is most important for them and their families. You can help them structure and stick to a strategic wealth management plan that makes the most of their financial resources to best meet their specific goals and objectives.

You're emotionally intelligent. You're skilled at developing and maintaining long-term relationships of trust, especially with high net worth people who have high expectations of professionalism, quality and discretion.

You're a leader. You enjoy taking on responsibility and look forward to leading a group of people who enjoy delivering exceptional service as they strive to continually grow and improve. Your enthusiasm and credibility attracts people, clients and business opportunities.

You're a problem solver. Based on your experience, you know that things change. New opportunities and challenges arise, economic circumstances change, and clients who want control over their lives often have questions, ideas and critiques. You're always one step ahead and agile enough to respond quickly, while working with clients and other professionals to arrive at an ideal solution.

You're motivated to learn and prosper. You've grown tired of corporate restrictions around personal growth and earning potential. You're looking for an entrepreneurial environment where you can finally harness your education, experience and professional network to reach your true potential.

You're driven by values. You've spent years focused on driving revenues…and you've done it successfully. But now in your mid-career, you know that financial results are just part of the equation. Helping families reduce stress, share knowledge inter-generationally and plan together brings them closer. And you'd like to be part of that.

If so, you just might be the exceptional professional we are looking for!

AND, who are we?

We're *First Affiliated Family Office Group*. We are a highly specialized boutique leader in the modern Family Office business. For over 30 years, we've been helping a growing, yet exclusive roster of high-net worth families with a wide array of wealth, lifestyle and legacy issues.

Some of these services include investment planning and management, financial management, tax and estate planning, risk management as well as acting as a family coach and lifestyle concierge.

Because we are a selective boutique, we work with a defined number of families, allowing us the pleasure of developing strong, enduring relationships while delivering personalized service based on the family's unique needs and values.

While we are a casual and friendly group, the expectations of our clients are high, the work is impeccably professional, the service is world class and our technology is leading edge.

What Will You Do?

As a Family Office Director for new and existing clients, you'll help assemble and lead the client's board of advisors, delegate tasks, manage your client service team, drive all client communications, as well as develop and maintain long and deep relationships with our clients. You will also guide the set up of the family office and oversee (in collaboration with a Client Investment Manager) the Strategic Plans, including strategic tax review and problem solving.

What Qualifications are required?

The role requires excellent strategic tax knowledge, estate planning expertise and strong understanding of investment principles. As a result, this job is ideal for a mid career professional who may be a Trust Officer, a CPA, CFA, or RFP.

This is an exciting opportunity to grow, to achieve, to lead and to have a dramatic positive impact on the lives of others.

Where are we?

We service our clients across Canada and overseas from our office locations in the GTA and Collingwood.

To see if we're a good fit, please send cover letter and resume to
careers@firstaffiliated.ca