Wealth Partner

Posted by Fidelity Investments

Posting Date : 27-Feb-2026

Closing Date : 26-Aug-2026

Location : Toronto

Salary : $$79,000–$90,000 Per Year

Job Requirements

- **Education**: Bachelor's
- **Language**: Bilingual
- **Years of Experience**: 1 year
- **Vacancy**: 2
- **Job Type**: Full Time
- **Job ID**: DISJ3748690

Job Description:

Complete job description
Description of the Job
Please take note:

All positions need current Canadian work permission.
As part of Fidelity's dynamic working structure, you will be working on a mixed schedule.
This is a full-time, regular opportunity.
Who We Are
For more than 35 years, Fidelity has assisted Canadian clients in creating better financial futures. We provide a variety of reliable investment portfolios and services to both people and institutions, and we're always looking for new and improved methods to assist our customers. Being a privately held firm, we aggressively welcome innovation in every facet as we expand our operations going forward.
Being employed by us entails joining a committed and varied team of individuals who, on a daily basis, really impact our customers and communities. You'll have a lot of chances to further your career in a welcoming setting where you'll feel appreciated and encouraged to reach your full potential on both a personal and professional level.
A brand-new wealth management solution called Fidelity Wealth was created to help financial advisers with their retirement and succession planning. Our aim is to enable financial advisers to confidently reach their own retirement objectives, knowing that their customers will still get top-notch investment management services and expert financial advice.

For further information on Fidelity Wealth, please go to:
The following: https://www.wealth.fidelity.ca/en/ We Do
The Wealth Associate is in charge of administration, sales support, client onboarding, and advisor assistance. A solid background in portfolio management and operations is required of the chosen applicant. The Wealth Associate will be responsible for overseeing the client onboarding process in this capacity. As a Wealth Associate, you will supervise a variety of activities from customers and Fidelity Head Office in addition to the duties mentioned below.
How You'll Influence Things
Client Onboarding and Advisor Support
Work together with the advisor to promptly and responsively meet customer requirements.
Compile and provide reports and suggestions to customers in accordance with advisor guidance.
Using digital technologies, create and process client material, such as account applications, forms, prospect letters, and other relevant documents.
Organize and monitor the account opening and customer onboarding procedures, making sure they are accurate and compliant with legal requirements.
Follow up with customers on any incomplete or missing paperwork.
Assist advisors by carrying out account modifications and/or investment instructions.
Determine and put into action proactive methods to meet the demands of your clients.
Client relationship management and sales support
Create and maintain up-to-date customer and prospect data in the CRM system.
Create and modify proposals, meeting agendas, presentation materials, client portfolio reports, and other documents to support client meetings.
Actively assist in the execution of client wealth plans by managing portfolio administration chores and operations in a thorough and precise manner.
Answer customer questions promptly, receptively, and professionally. This includes carrying out client requests for cash management.
Management
Communicate with the custodian on daily operational issues, such as establishing accounts, initiating and overseeing transfers, and carrying out daily reconciliation tasks.
Oversee and plan a new advisor's onboarding process, potentially including hundreds of new customers at once.
Keep up on financial advising services best practices, laws, and developments in order to

contribute to marketing and customer service initiatives.
Work together with both internal and external stakeholders, including marketing, operations, compliance, and custody, to guarantee smooth client service delivery.
The Knowledge You Provide:
strong familiarity with wealth management practices, products, and industries
Outstanding interpersonal, writing, and customer service abilities
Exceptionally well-organized, detail-oriented, and capable of setting priorities
A cooperative individual who can work with cross-functional teams
Knowledge of client-specific regulatory needs, such as KYC/AML regulations
Capacity to operate across many channels and/or workstreams in a dynamic, fast-paced setting like taking on several roles, putting in extra effort, and finishing tasks.
What We're Seeking
A university degree in business, commerce, finance, or a similar discipline is necessary, as is comparable professional experience.
Two to three years of relevant experience in the field of wealth management operations
Strong background in financial planning and expertise with Salesforce and portfolio management tools
Currently has an IR or RR license and is required to complete the Conduct & Practice Handbook (CPH) and the Canadian Securities Course (CSC).
Being bilingual is advantageous.
Registration with one or more securities authorities is necessary for this position. As mandated by securities authorities, the incumbent must fulfill all background investigation requirements, including but not limited to education, credit, litigation, and criminal checks. You must also fulfill the ongoing registration requirements in order to continue working in this position.
Total Benefits That Show Your Influence
We think outstanding effort merits outstanding acknowledgment. For this reason, we provide a competitive pay plan that will help you succeed now and maintain your financial security in the future.
Your overall compensation for this position consists of:
The basic salary and discretionary performance bonus might vary from $79,000 to $90,000 per year, depending on your credentials and expertise.
Contribution to an RRSP: We invest in your future with an RRSP contribution after six months of work; employee matching is not necessary.
We take pride in providing a benefits package that complies with provincial regulations on pay transparency.
This job ad is a chance to fill a position in our company where your skills will have a significant impact.
We'll do the following to make you feel appreciated and encouraged as a member of our team:
Flexible work schedules: in-office, hybrid, and 100% remote choices
Competitive total remuneration that doesn't need you to match business payments to your group RRSP
With 100% employer-paid premiums, comprehensive health benefits begin on your first day and include up to $5,000 a year for therapy and mental health services.
25 weeks of parental leave top-up equal to 100% of your pay
Up to $650 for equipment for a home office
generous vacation policy that includes two paid days every year to volunteer at your preferred charity
Programs for diversity and inclusion, such as a vibrant network of Employee Resource Groups
Numerous chances for professional growth, such as tuition reimbursement, access to more than 11,000 training and development courses, and financial incentives for earning a necessary

designation
Fidelity Canada offers equitable employment opportunities.
Fidelity Canada is dedicated to promoting an inclusive and diverse workplace. Regardless of race, color, religion, sex, sexual orientation, gender identity or expression, national or ethnic origin, age, disability, family status, protected veteran status, Aboriginal/Native American status, or any other legally protected ground, we will take into consideration all eligible candidates for employment.
During the application procedure, accommodations
Applications from individuals with impairments are encouraged and welcomed by Fidelity Canada. Candidates participating in the selection process might seek accommodations. Please send an email to FidelityCanadaStaffing@fidelity.ca if you need accommodations.
Please do not contact agencies or make phone queries. We appreciate your interest, but please be aware that we will only get in touch with those who are chosen for an interview.
Why Do You Want to Work at Fidelity?
We are honored to have received the following:
Honors
The Top 100 Employers in Canada
The Best Employers in Greater Toronto
The Best Family-Friendly Employers in Canada
o Canada's Leading Employers for Youth

Great Place To Work® Accredited as Top Workplace for Inclusion
The Greatest Workplaces for Mental Health
o Top Workplaces for Women o Top Workplaces for Today's Youth o Top Workplaces in Financial Services & Insurance
Ontario's Top Workplaces
The Most Reliable Executive Teams in the Best Workplaces
Canada's Top Companies on LinkedIn

The Greatest Place to Work: Human Resource Director (HRD)
o HRD's Five-Star Benefit Plan
o HRD: Five-Star Employer for Diversity and Inclusion
Labels
Certified Benefits of Canadian Compassionate Companies Canada's Future of Work Strategy: Workplace Benefits Award
The TalentEgg National Recruitment Excellence Award is a unique honor for hiring practices that promote diversity and inclusion.
The Most Creative HR Team in Canada, Per HR Reporter

To apply for this job vacancy, please send your resume along with a cover letter and a refrence letter from your previous employer to the following email: FidelityCanadaStaffing@fidelity.ca