



N NICOLA
WEALTH

Private Wealth Internship Program

**INTERN TODAY,
WEALTH PLANNING ASSOCIATE TOMORROW**

Join the Nicola Wealth Community

As a member of our Internship Program, you will be part of our Associates Team, learning from our Wealth Planning Associates (WPA) team and Wealth Advisors.

The Associates Team is a diverse group of high-achieving individuals who have a mutual goal of supporting each other through challenges to achieve both individual and team success.

As a team, we embrace the **core values** of Nicola Wealth in conjunction with the Associates team goals and values listed below.

GOALS:

1. **Training and Development** – continuous learning and growth for both technical and human skills
2. **Boosting Work Performance** – technological improvements and ideas for improving workflow and processes
3. **Strengthening Relationships** – between other teams in the firm and advisors
4. **Supporting Each Other** – peer-to-peer mentorship

VALUES:

1. The Success of our Clients
2. Mutual Respect and Collaborative Relationships
3. Hard Work, Innovative Problem Solving, and Continuous Self-improvement
4. Initiative and Leadership

We look forward to your journey with us.

Sincerely,

Selena Woo, CFP, CPA, CMA

Vice President, Private Wealth – Associates

Craig Brigidear, CFP

Senior Manager Private
Wealth – Associates

Lauren Tattrie, QAFP

Senior Manager Private
Wealth – Associates

Willa Tao, CFP

Senior Manager Private
Wealth – Associates

Yvonne Seiler, CIM

Senior Manager Private
Wealth – Associates

Nicola Wealth Core Values

We Share the Pie

We operate with an abundance mindset and believe that contribution, growth, and success should benefit all.

We are Driven

We are committed to superior performance and exceptional client service.

We are Collaborative

We willingly and proactively work within and across teams to support our shared success. Our best work comes from collaboration, not silos.

We Care

We care about the wellbeing of our people, about our clients, and our communities.

We are Innovative

We are not satisfied with the status quo. We are motivated to continuously improve, looking for new and better ways to serve our clients, provide thought leadership, and optimize our business for the future.

Program Objectives

We developed this comprehensive 1-year program to provide learning and development opportunities paired with training, practical experience, and mentorship to accelerate into a wealth planning career with us.

- Understand the business and learn from the ground up
- Meet leaders from other Nicola Wealth departments to gain exposure to different functions and how they work together in supporting our clients
- Intentional learning objectives that are meaningful and structured to reflect the experience of the Wealth Planning Associate (WPA) role
- Participation in ad hoc Private Wealth projects, committees, and Wealth Planning Associates Committee (WPAC) initiatives
- Develop industry knowledge and enhance soft skills
- Direct mentorship from members of Private Wealth
- Support career, professional, and personal development



Success Factors

- Strong attention to detail
- Consistency in delivery of client experience
- Excellent organization skills
- Strong communication (verbal, written)
- Solutions-based mindset
- Positive, “can do” attitude
- Curious and inquisitive
- Asks great questions
- Humility
- Receptive to feedback with openness to change
- Self-starter; resourceful
- Team player
- Ability to build rapport with our Private Wealth Team
- Canadian Securities Course

Evaluation

- Formal assessments at 3-months and 6-months
- Regular 1:1 weekly check-in with Associates Management Team



Your Path to Success

JUNE 2026

Learning Objective:
Building a Foundation

Program Journey

Activities:

- Introduction to Nicola Wealth
- Meet leaders from other departments
- Learn about the Private Wealth Team
- Meet members of the Associates Team
- Outlook management
- Email etiquette
- Business communication
- Nicola Wealth and custodian systems training

JULY TO
SEPTEMBER 2026

Learning Objective:
Part 1: Learning the fundamentals of the WPA role

Activities:

- Client information required for account openings
- How to work in collaboration with other teams
- Prepare planning-related forms and paperwork
- Prospect process
- CRM-related tasks
- Basic client review meeting preparations

OCTOBER TO
DECEMBER 2026

Learning Objective:
Part 2: Learning the fundamentals of the WPA role

Activities:

- National Bank (NBIN) cash management tasks
- Portfolio management recommendations
- Registered contributions and associated tasks
- Private Client Access Website (CLWEB)
- Mobile app
- Prospect and Accountant portal
- Private Giving Foundation (PGF) and associated tasks

JANUARY TO
MARCH 2027

Learning Objective:
**Part 3: Learning the
fundamentals of the
WPA role**

Activities:

- Tax season
- Tax slip management
- Tax reporting (fiscal reports)
- Management fees

APRIL TO
JUNE 2027

Learning Objective:
**Integrating knowledge
and skills**

Activities:

- Work more closely with Advisory Teams
- Work with an assigned WPA mentor

JUNE 2027

**Potential transition
to WPA role**

Upon successful completion of the program, there may be opportunities to continue your career as a valued Wealth Planning Associate and join one of our high-performing Advisory Teams to service our clients with the knowledge and experience gained throughout the program.

Internship Testimonials

Wealth Planning Associates

2021



MITCHELL ROBINSON
Senior Wealth Planning Associate

My time as a Wealth Planning Associate at Nicola Wealth has been remarkable. The dynamic work environment and supportive team, combined with the overall culture of the firm has made my time at Nicola Wealth a truly fulfilling experience.

2022



EVA CUSTEAU
Wealth Planning Associate

Working as a Wealth Planning Associate Intern at Nicola Wealth has been an incredible learning opportunity. The company culture, which places an emphasis on teamwork, support and growth have made for an excellent experience.

2023



PATRICK CHAN
Wealth Planning Associate

Coming from a non-financial background, I initially found the world of wealth planning a bit intimidating. However, with my experience in international competitive sport, I quickly found familiarity and comfort in the structured approach of the Private Wealth Internship. The strong culture of peer support and the team-first mindset made it easy to find my purpose and gain the knowledge needed to pursue my goals.

What stood out most was the clarity in expectations - targets and objectives were well-defined, and the best path to success was always visible. Regardless of your role, the environment is welcoming, and there's always an opportunity to ask questions and learn from associates and advisors. The internship provided me with all the tools, resources, and guidance needed to build a career in the financial industry.