

TD Wealth takes a sophisticated and holistic goals discovery approach to wealth planning and protection to provide highly personalized advice, solutions and service to clients.

Financial Planning team understands that helping clients set and achieve their financial goals while delivering a legendary customer experience is what drives our business success, new business and client loyalty. We do this by knowing our clients, offering the most professional and personalized solutions and building award-winning, high-performing teams.

We have a long and growing history in wealth management leadership and are poised for even greater future success. Feel welcome, challenged and rewarded. Trust us, you'll be busy, but never bored.

Are you an experienced professional skilled at providing mass affluent investing clients with comprehensive financial planning and advice? If so, then apply for the position of **Financial Planner** today to assist clients in meeting their financial goals and objectives.

With a focus on relationship management, advice and business development, you will:

- Identify your client's life and financial goals, provide comprehensive reviews and build long-term relationships through financial planning expertise, relationship building and ongoing services
 - Conduct reporting and relevant analysis using results to draw conclusions, make recommendations and continually assess the effectiveness of programs, policies and practices
 - Contribute to team and department goals while strengthening customer service and dedication
 - Monitor service, productivity and assess efficiency and implement continuous improvements
 - Be knowledgeable of best practices and procedures and stay ahead of emerging trends
 - Acquire and apply expertise, provide mentorship, assistance and direction to others
 - Maintain a culture of risk management and control, supported by aligned risk appetite
 - Participate fully as a member of the team, support a positive and service-oriented work environment
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- University Degree and/or 3-5 years industry experience
 - Canadian Securities Course (CSC) required
 - IIROC license preferred (required within first 90 days in role)
 - Complete Conduct & Practices Handbook (CPH) within first 90 days in role
 - IQPF licensing required prior to start date (for Quebec only)
 - Complete Wealth Management Essentials (WME) within first 30 months in role
 - Achieve Certified Financial Planner designation within first 2 years in role
 - Deep understanding of the industry, competitive landscape and economic market issues
 - Strong communication skills with ability to work collaboratively and independently, provide assistance and build relationships

Event Details:

Are you an experienced Financial Planner looking for a rewarding place to work with an amazing company culture? Or are you a banking professional interested in building a financial planning career? If so, you won't want to miss this exciting national event!

TD Wealth is hosting a Virtual Financial Planning Career Event through a live Webinar! You will have the unique opportunity to hear directly from David Terry, Vice President Financial Planning, as well as other leaders & guest speakers. You will then be able to ask questions during a dedicated Q&A session.

You will gain insights into the model and vision of TD Wealth Financial Planning and learn why we are an industry leader.

The great thing is, you can dial in from the privacy of your own home or office to listen, learn and ask questions on a confidential basis.

Date: Wednesday, May 19, 2021

Eastern: 7:00 – 8:00pm

Pacific: 4:00 – 5:00pm

Mountain: 5:00 – 6:00pm

Atlantic: 8:00 – 9:00pm

This event is by invitation only. You should attend this event if you are an experienced financial professional currently working in the industry. It is an asset if you have completed the CSC and/or CFP designation or are currently IIROC licensed. If you reside in Quebec, please note you must have successfully completed the Financial Planning Diploma delivered by the IQPF.

If you would like to attend, please apply to this requisition. An email confirmation with the event details & webinar link will be sent those eligible for invitation.

*** This event will be presented in English ***