Job Posting – Associate Advisor
January 2022

Who we are

ARC Financial Planning Group Ltd. work as financial architects for our clients. We help secure and maintain our clientele's financial futures by keeping their financial plans up to date and tax efficient.

The primary focus of the Associate Advisor will be to help enhance client services and sales for our existing clientele. This entails holding meetings with our clients with the goal of both keeping clients well serviced and maintaining the business within the firm.

At this point, it will the Associate Advisor's responsibility to handle the administration from the business generated.

The successful candidate for this career will have:

- LLQP Life license (required)
- Investment Funds in Canada (IFC) or the Canadian Securities Course (CSC), or the ability to obtain within the first year of employment
- Have or be working towards designations such as QAFP and/or CFP
- Documented prior successes with selling investments and life insurance (an asset)
- A desire to help people plan for the future and the ability to motivate them to make decisions and act (sales ability)
- Familiarity with financial planning tools
- A friendly, positive and personable nature
- An ability to adapt to change and to work in a fast-paced environment
- Professional verbal and written communication skills
- Strong organizational, time management, communication and priority setting skills in order to meet deadlines

What you will be doing

Servicing existing clientele

- Schedule and hold client meeting interviews
- Service existing investment portfolios and make on-going recommendations to them
- Review and respond to clients changing needs and financial circumstances
- Provide exceptional relationship attention and service to all clients
- Leverage the principal advisor's time so they may focus on their ideal and top clients

New Client Acquisition

- Actively prospect by obtaining referrals within the existing block of clients
- Identify prospects within own personal networks (natural market)
- Develop strong relationships with Centres of Influence (e.g. Mortgage Broker, CPA, etc.)
- Other marketing activities such as attending client events, tradeshows, etc.

Financial Planning

- Conduct in-depth reviews of clients' financial circumstances, current situation and future goals, with an emphasis on retirement projections
- Explain issues and concepts related to the overall financial planning process
- Input client data in financial planning software and identify problem areas and opportunities

- Prepare potential solutions and motivate prospect/client to take action to implement solutions

Product Solutions

- Follow through on the investment portfolios reviews and financial planning by implementation of product solutions
- Recommend and explain different types of product solutions to clients and guide them to choose the most appropriate for their situation
- Investments – analyze and develop portfolios, prepare reviews
- Insurance – service and sell life, critical illness, disability and segregated funds
- Maintain proper documentation following preset guidelines/compliance

Insurance and Investment Administration

- Expedite the insurance underwriting process by reviewing paperwork; processing insurance business; liaising with underwriters and medical organizations; and keeping clients informed as to where they are at in the process
- Process investment accounts from signing to successful integration into the client's portfolio (entering and following up on trades) as well as processing client withdrawals, deposits, switches and transfers

If you are interested in continuing your financial services career with ARC Financial Planning Group Ltd., please apply with a cover letter to kim@thepersonalcoach.ca.
We are looking forward to getting to know you.