Financial Planner

Branch: Assante Vancouver Centre, an independent branch of Assante Financial Management Ltd.
Branch location: Downtown Vancouver
Contact: labernethy@assante.com
Application Close Date: Ongoing

Assante Vancouver Centre branch is a premier wealth management firm with its office in downtown Vancouver. With over 20 years in operation and 10 practices encompassing 75 people, our AVC branch puts an equally, strong emphasis on delivering top level client service, continued learning with peer collaboration and enjoying our time together with a strong social culture. Joining our firm, you will quickly see why everyone has said they are with their forever work family!

One of our highly successful and established practices is growing and looking to add to their client relationship team. They are looking to bring on an experienced Planner to join their three other Planners in servicing their clients. This is a tremendous opportunity for a career-oriented person looking to join a full-service financial planning practice that focuses on assisting clients through major life changes such as Retirement, Divorce, Disability and Death.

If your career objective is to push your financial career forward whilst settling yourself down within a close-knit team, please reach out as we have the role for you!

Duties & Responsibilities:

- Play an integral role as part of a team with the goal of providing a seamless client service experience
- Attend client and prospect meetings with existing financial planners and independently
- Assist with referral generation, through professional, personal and client opportunities
- Assist in the preparation of financial plans, portfolio and insurance reviews and income tax reviews and presentation of same
- Assist with tax preparation for clients
- Ensure completion of all required materials and tasks before, during and after client meetings with support of administrative team
- Liaise and assist with our client's professional advisors including lawyers, accountants, and bankers as needed
- Attend client, networking, or industry events

Experience and Qualifications

- Minimum of ten years of related work experience in financial services, ideally 5 years in a client servicing role
- Established client book will be considered for amalgamation into practice, please share in your application if this is applicable
- Preference to someone with a tax background
- Working knowledge of investment and insurance products

Education/training

- Financial Planning designation (CFP, RFP, PFP or CIM) successfully completed
- Mutual Fund license either active or ability to be licensed
- BC Life Insurance license or desire to obtain

Skills & Abilities

- Preference will be given to applicants with a tax background, experience in a client-facing role and a detailed knowledge of financial planning principles.
- A highly motivated individual with a willingness to learn and be mentored by others
- High interest in career development and taking on more advanced advisory responsibilities
- Professional communication skills both written and verbal
- Ability to multitask, maintain a high level of accuracy and demonstrate attention to detail
- Team oriented – Helpful, encouraging, and supportive personality
- Understanding of back-office procedures and compliance in a MFDA environment
- Strong computer and technical skills in a Windows/PC environment
- Proficient in Word, Excel, Outlook, and Salesforce

Please submit a resume and cover letter. Thank you to all those that apply. Unfortunately, we will not be able to reach out to all applicants and will only be in contact with those that meet all the requirements of this position.