Financial Planning, Associate

Job title: Associate Planner
Branch name: Assante Vancouver Centre, an independent branch of Assante Financial Management Ltd.
Branch location: Surrey Panorama Ridge (Primary) and Vancouver Downtown (Secondary)
Contact: labernethy@assante.com
Application Close Date: August 15th 2021

Job description

Assante Vancouver Centre branch is a premier wealth management firm with offices in downtown Vancouver and Surrey. With over 30 years in the industry, our branch offers our clients a personalized and comprehensive planning experience.

One of our highly successful and professional practice teams Legacy Family Office is expanding and looking to add to their Surrey Office. They are looking to bring on an Associate Planner to work alongside their six Planners in servicing their clients. This is a tremendous opportunity for a career-oriented person in the financial services industry looking to join a full-service financial planning practice that focuses on multi-generational family businesses, tax strategies and wealth management. The successful candidate will be mentored to help develop more advanced advisory skills, with the goal of taking on a primarily client-facing role.

This is a full-time position with a competitive compensation and benefits package. Onboarding will be conducted from the Vancouver office with a recurring schedule 1-2 days a week thereafter. The job opening is for Fall 2021.

Duties & Responsibilities:

- Play an integral role as part of a team with the Financial Planners and administrators
- Assist in the completion of required materials and tasks before, during and after client meetings
- Attend client meetings with financial planners when required
- Engage clients on a regular basis by handling incoming and outgoing correspondence to provide client service & support
- Assist in the preparation of financial plans, portfolio and insurance reviews and income tax review
- Serve as a support to the Administrators for form preparation, statement requests and other administrative requirements
- Liaise and assist with our client's professional advisors including lawyers, accountants and bankers
- Maintain a strong understanding of industry regulations, policies & procedures, and compliance requirements. Keep the team prepared for upcoming changes

Other Responsibilities (not limited):

- Organize data, information and files in Microsoft OneNote and CRM
- Maintain client tracking spreadsheets
- Help coordinate and attend client, networking or industry events
- General admin duties

Experience and Qualifications

- Minimum of three years of related work experience in financial services
- Preference given to someone who worked in a similar role of client servicing and financial planning
- Working knowledge of investment products and vehicles

Skills & Abilities

- A highly-motivated individual with a willingness to learn through practical, technical and educational formats
- High interest in career development and taking on more advisory responsibilities as the opportunity arises
- Strong and professional communication skills both written and verbal
- Strong multitasking skills with the ability to prioritize high urgency/sensitive items
- Ability to obtain a high level of accuracy and a strong 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
- Highly proficient in Word, Excel, Outlook and SalesForce

Education/training:

- CIFC, IFC or CSC successfully completed preferred (able to be licensed)
- BC Life Insurance license or desire to obtain.
- CFP or willingness to pursue
- Post-secondary education; or relevant work experience;

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.