Associate Planner- Little and Davies Insurance and Financial Planning

Job description

At Little & Davies Insurance & Financial Planning, for over 20 years we've provided personal service and valuable financial advice to help our clients make smart decisions. We are dedicated to providing quality client service, sound financial advice, and investment/insurance products that are best suited to meet our clients' needs and goals.

The successful applicant will focus on supporting the Advisors in managing existing portfolios, developing new business, and maximize efficiency by providing administrative and financial planning support.

Specifically you will:

- Grow your practice, develop and deepen existing client relationships.
- Support with investment planning and business development.
- Develop new business and opportunities within the professional entrepreneur and retiree market.
- Prepare presentations and various pieces for the Advisors use in implementing financial planning strategies.
- Review client accounts, maintain account lists, and track client documentation.
- Work alongside and in collaboration with the administrative and support team in various tasks and projects, for the benefit of the Advisors and Associates.
- Create new financial plans for clients and/or review their existing plans.

The Benefits:

- A competitive compensation package, with potential for advancement through experienced mentorship where you are rewarded for growing and maintaining a client base.
- Exposure to an independent wealth management environment, with a vast network of established clientele, and industry/institution leaders with a combined 100 years of experience.
- Subsidized education, contributing into growth and career development.
- Flexible medical/dental benefits.
- Leading edge resources, CRM and FP software.

Must Haves:

- Canadian Securities Course and/or Canadian Investment Funds Course, and completion of a financial planning designation: CFP or PFP.
- 2+ years of investment related experience and providing financial planning recommendations.
- Must have a solid understanding of investment portfolios, mutual funds, and current knowledge of daily market activities.
- Proficient in using Outlook, Word, Excel, PowerPoint, and possess the aptitude for learning new financial planning programs.
- Strong interpersonal skills and demonstrated ability to build relationships and attract new business.

- A desire and passion to develop and sustain growth.

Added Value:

- Extensive knowledge of current MFDA compliance standards and regulations.
- Life License Qualification Program (LLQP), or willing to obtain.

Job Types: Full-time, Permanent

Salary: $50,000.00-$80,000.00 per year

Contact Email: bryce@littleanddavies.com

Application Deadline: Feb 15th