

Job Title: Senior Financial Planner

Company: Bayview Financial Group, Inc.

Location: Winnipeg, MB

About Us: Bayview Financial Group is a dynamic and client-focused financial services firm committed to delivering personalized and comprehensive financial planning solutions. With a strong reputation for excellence and a client-centric approach, we take pride in providing strategic advice and guidance to individuals and businesses alike. As we continue to grow, we are seeking a highly skilled and experienced Senior Financial Planner to join our team.

Position Overview: Senior Financial Planner

Responsibilities:

1. Client Relationship Management:

- Cultivate and manage strong, long-term relationships with clients.
- Conduct in-depth financial consultations to understand clients' goals and objectives.

2. Financial Planning:

- Develop and implement comprehensive financial plans based on clients' unique needs.
- Provide expert advice on retirement planning, investment strategies, tax optimization, and estate planning.

3. Portfolio Management:

- Oversee and manage investment portfolios to align with clients' financial goals and risk tolerance.
- Stay informed about market trends, economic developments, and industry best practices.

4. Compliance and Regulation:

- Ensure compliance with all relevant financial regulations and industry standards.

- Keep up-to-date with changes in financial laws and regulations.

5. **Team Collaboration:**

- Collaborate with other team members, including administrative staff, to deliver holistic financial solutions.

Qualifications:

- Certified Financial Planner (CFP®) designation.
- ☒ 5+ years of proven experience as a Financial Planner or similar role.
- Strong knowledge of financial planning principles, investment strategies, and tax considerations.
- Excellent communication and interpersonal skills.
- Detail-oriented, analytical, and capable of managing multiple priorities.

How to Apply: If you are a seasoned Financial Planner with a CFP® designation and have a passion for delivering exceptional client experiences, we invite you to apply by submitting your resume and a cover letter to applications@bayviewfinancial.ca. Please include "Senior Financial Planner Application" in the subject line.

Deadline for Application: May 15/2024

Bayview Financial Group is an equal opportunity employer. We encourage applications from candidates of all backgrounds and experiences.

Thank you for considering Bayview Financial Group as your next professional home. We look forward to reviewing your application!

Bayview Financial Group is committed to ensuring a safe and healthy work environment in compliance with local health guidelines. Interviews may be conducted virtually, and onboarding procedures will be adjusted as needed.