

Senior Advisor Financial Planning (ID: INV0001K)

- Are you passionate about financial planning?
- Would you like to work with our team of financial planners to help Investment Advisors and add value for clients?
- Are you known for your proven expertise in integrated financial planning, in financial and tax planning?

Join National Bank Financial Wealth Management!

We are the fifth largest securities brokerage firm in Canada. We have over 850 Investment Advisors in over 85 branches, helping more than 260,000 clients manage their assets.

In this role, you'll provide sophisticated financial planning advice to the clients of Investment Advisors. You may also be called on to provide financial and tax assistance to the firm's Financial Planners and your colleagues across the country (excluding Quebec). You will work in partnership and be able to count on the advice of other wealth management experts in order to meet clients' needs.

This position is located in Calgary.

Your main challenges will be to:

- Prepare integrated and complex financial planning reports for Investment Advisors' wealthy clients
- Meet with the clients (and their legal professionals and tax experts, as required) and advisors to present the analyses and financial planning reports
- Perform various in-depth analyses on specific aspects of financial planning
- Provide tax support to the team of financial and estate planning experts
- Play a leadership role in your area of expertise
- Understand business issues, identify the needs of various parties and propose strategies to support their activities, keeping in mind the varied nature of the files
- Identify business opportunities
- Reach objectives by working closely with business partners, including Wealth Management Solutions Group - Managers, Regional Managers and Assistant Regional Managers
- Work closely with other professionals, including Trust Officers and Estate Planners, Tax Advisors, Insurance Specialists, Bankers
- Publish articles or specialized information documents and act as conference speaker
- Closely follow developments of various tax laws and other legislation and proceed with various analyses to assess impacts on the personal finances of clients
- Monitor market developments and stay abreast of trends to propose adjustments, as required

Qualifications :

- Be a member of FP Canada (CFP Designation)
- Bachelor's degree in a related field, master's degree in taxation or specialized field such as accounting or actuarial science

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- At least ten (10) years of experience in financial planning and/or financial advisory services
- Recognized expertise in integrated financial planning
- Strong analytical skills and ability to combine the subtleties of different financial planning disciplines to make recommendations on complex financial issues
- Ability to form relevant financial opinions further to interpreting various fiscal changes
- Integrity and solid communication skills
- Excellent ability to influence
- Be comfortable using Excel (and other Microsoft Office suite tools)
- French language an asset

You want to take up this CHALLENGE? Submit your application now on our career web site please:

<https://banquenationaleducanda.taleo.net/careersection/e8k61cf/jobdetail.ftl?lang=en&job=INV0001K>

At National Bank, we stand out by investing in our employees throughout their careers—as demonstrated when we were awarded silver in the "Most Innovative use of HR Technology" category at the 2020 Canadian HR Awards for our use of Axonify, a personalized learning solution that can be used every day.

The Bank has innovated by modernizing its performance evaluation system to better meet our clients' evolving needs. From now on, the corporate values (expected behaviours) of partnership, agility and empowerment count as much as the business objectives.

Working at National Bank means having access to competitive working conditions, a wide range of employee benefits, a dynamic work environment and telemedicine services.

National Bank values all aspects of diversity and sees it as a tremendous source of wealth. We want to offer an open, respectful work environment where all employees can achieve their full potential. Senior management has made a concrete commitment to promote this value across all sectors of the organization. We're committed to providing accommodations as needed and ensuring accessibility during the recruitment process and after hiring. If you have any specific needs, please let us know during our initial conversation and we'll be happy to accommodate you.