



Centralized Planner

Job Description:

As a member of Private Wealth Management, the Centralized Planner is responsible for partnering with TD advisors to deliver high value customized guidance and recommendations on retirement, tax, estate and overall wealth planning to HNW clients of TD. Specifically, the Centralized Planner has accountability for:

- a) Providing professional financial, tax, estate and risk management planning support and solutions to qualifying clients of TD Wealth;
- b) Assisting advisors and relationship managers with creating and updating financial plans, opportunity spotting, and revenue generation; and
- c) Executing TD Wealth's high net worth strategy.

The Centralized Planner is an experienced practitioner whose expertise is leveraged by partners in TD Wealth and Wealth Advisory Services. He/she/they will support a dedicated region in driving the strategic vision of delivering wealth planning to TD's clients.

Key responsibilities include:

- Preparing customized wealth plans based on information obtained directly from HNW clients and their TD Wealth advisor
- Carrying out independent research to ensure client's key issues (retirement, tax, philanthropic and estate planning) are addressed
- Keeping informed of relevant wealth planning (retirement, tax, estate planning, etc.) developments and keeping TD partners informed of developments
- Proactively spotting, anchoring, introducing and following up on opportunities for complimentary businesses and solutions
- Working effectively to develop and maintain relationships with TD Wealth advisors and Branch Managers
- Delivering wealth planning presentations to Advisors and clients
- Developing strong internal and external networks and referral sources
- Ensuring appropriate service levels are provided to maximize role profitability, minimize costs and manage business to avoid financial losses and reputational damage to TDBFG
- Carry out other tasks and duties as assigned by manager from time to time

Education/Accreditations:

- 1) Undergraduate degree

- 2) Certified Financial Planner (CFP) designation
- 3) 8 years of relevant experience in all aspects of Wealth Planning
- 4) Complex Financial Planning experience
- 5) Strong analytical and judgment skills.
- 6) Computer skills: Microsoft Office, Voyant (Financial Planning software).
- 7) Ability to work both as part of a team and independently

Other Qualifications/Skills/Experience:

Minimum 8 years of financial or wealth planning experience gained at an accounting firm or financial institution

A self-starter with the ability to work independently and to provide high quality services to clients

Excellent people and relationship building skills

Strong communication, presentation, time management, and organizational skills

Computer proficiency (Word, Powerpoint, Excel, etc.)

Professional designation such as CA, CGA, CMA and/or LL.B an asset

Investment and insurance industry knowledge strong assets