Assistant Financial Planner/Advisor
Competitive Base salary with commission and bonus if target is met.
Job Types: Full-time, Permanent
Location: Pickering, ON

Responsibilities and Duties:

- Duties include providing continuous assistance and support to the Senior Financial Advisor/President and his clients that may include: acting as a financial paraplanner; data entry and preparation of financial, retirement and estate plans; researching tax and financial planning issues; processing and verifying investment trades; completing investment, mutual fund and insurance paperwork; preparing client files for the Advisor's review; transcribing notes from client appointments; completing drafts of Advisor's emails to clients; various other administrative tasks as assigned, including general office administration

Qualifications and Skills:

- High attention to detail and excellent follow through is required and is key to success. Must be self motivated, willing to learn, organized and focused with exceptional time management skills, an excellent communicator, and works well with numbers
- A polished image will be an advantage in this professional fast paced environment
- University degree or college diploma desired. CFP (Certified Financial Planner) or working towards CFP (or similar designation) advantageous Investment Funds in Canada (IFIC / CIFC), Canadian Securities Course (CSC), financial planning courses and similar courses are very beneficial
- Knowledge of tax and investment strategies, securities, and insurance
- Although not initially required, the candidate will need to be CFP licensed within a practical time
- Several years of experience is preferred, however, we are willing to train a candidate who has the right skill set
- Candidate should have at least 5 million in assets but not a requirement