Durward Jones Barkwell is one of the largest public accounting firms in the Niagara/Hamilton/Halton region with offices spanning from Burlington to Welland. The firm was founded in 1940 and features a dynamic group of professionals including over 40 Partners and Managers. **DJB Wealth Management Inc.** originated in 2014, and is a company owned by Durward Jones Barkwell & Co. LLP.

At **DJB Wealth Management Inc.,** we help clients to realize their goals through a truly integrated wealth management service. Our team of dedicated Certified Financial Planner™ professionals will work with clients to achieve their financial goals and objectives. Using a flexible, tailored approach, combined with our expertise in business and personal financial planning, we assist our clients in developing strategies and plans that best suit their needs.

As a top employer in our industry**,** we lead in offering our employees an exceptional place to work. We offer all of our employees:

- Competitive compensation and benefits package
- Flexible work/life balance and summer hours
- Professional development, learning, and growth support
- A variety of community involvement opportunities

Our Hamilton or St. Catharines office has an immediate opening for a full-time Financial Planning Associate for DJB Wealth Management Inc. The Financial Planning Associate is a junior advisor/support position that provides technical support for our financial planners. Reporting to the Vice President of DJB Wealth Management Inc., you will be responsible for:

- Financial planning, including coordination and collection of data, completing data entry, setting up meetings, and providing administrative support for the implementation of the financial plan
- Meeting regularly with Firm partners and staff to educate them on the Wealth Management offerings and how and when to introduce clients
- Liaising with IAIC
- Managing client relationships by addressing questions and concerns and managing issues promptly
- Developing and maintaining client relationship management system (CRMS)
- Acting as back up to Client Service Associates, including filing scanning, document preparation, calling clients to set up appointments, printing reports and more
- Adhering to practice and ethical standards accordingly, and staying up-to-date and conversant with financial planning concepts and practices

The successful candidate will have:

- Bachelor's Degree or equivalent
- Certified Financial Planner (CFP) designation or enrolled in CFP courses
- Minimum two (2) years of related experience
- Working knowledge and proficiency in Microsoft Office Suite
- Strong attention to detail and organization skills
- Experience with NDEX, NBIN, Fidelity, Financial Planning Software
- Experience with Salentica (CRM) considered an asset

How to Apply:
Please apply directly to the position at www.djb.com/jobs. For any questions, please contact Fran Bonomi (fbonomi@djb.com).

If you are a confident, dedicated and hardworking professional who is motivated to achieve high standards of quality service and value to clients, we would we love to hear from you!

We appreciate all who express interest; however, only those selected for an interview will be contacted.

In accordance with the Accessibility for Ontarians with Disabilities Act, 2005 and the Ontario Human Rights Code, DJB will provide accommodations to applicants with disabilities throughout the recruitment, selection and/or assessment process. Please inform Human Resources of the nature of any accommodation(s) that you may require.