

The role of the Estate and Financial Planning Services (EFPS) Financial Planner is to provide estate and financial planning services to qualified clients and an ability to engage experienced advisors in more complex opportunities. This role requires a blend of technical ability along with outstanding communication skills to review financial plans with advisors and clients. The EFPS Financial Planner provides personalized comprehensive financial planning to clients via advisors.

While the role contributes to sales, this role is an advisory role that requires being kept at arms length from the sales role. Planning employees are not commissioned sales people nor are they licensed to sell product. It is important that clients view this service as balanced and objective.

What will you do?

- Contribute to sales results by providing EFPS qualified clients with comprehensive financial planning advice
- Serve as a financial planning services resource for advisors and Districts
- Deliver seminars/presentations on advanced planning topics
- Maintain a current and thorough knowledge of estate and financial planning through research, attending industry related functions, etc.

What do you need to succeed?

- Excellent knowledge of estate and financial planning
- Superior verbal and written communication skills, excellent facilitation and presentation skills
- Strong relationship management skills, analytical ability
- Full competence in the use of Sun Life Financial Distributors financial planning support tools (SVFA).
- Mandarin speaking is an asset
- 5+ years in a Financial Planning or related role, one or more of the following: CFP, CLU, CPA, LLB, CSC, RFP

What's in it for you?

- 20 days vacation per year
- Flexible Benefits from the day you join to meet the needs of you and your family
- Pension, stock and savings programs to help build and enhance your future financial security
- Wellness programs that support the three pillars of your health – mental, physical and financial
- Fitness and wellness programs that help you balance work and life and enjoy a healthier lifestyle