Financial Planner (Tax Specialist)

Job title: Financial Planner
Branch name: Assante Vancouver Centre, an independent branch of Assante Financial Management Ltd.
Branch location: Surrey Panorama Ridge (Primary) and ability to travel into Vancouver Downtown office (Secondary)
Contact: corp@assante.com
Application Close Date: Ongoing
Hire Date: Summer 2022

Job description

Assante Vancouver Centre branch is a premier wealth management firm with offices in downtown Vancouver and Surrey. With over 30 years in the industry, our branch offers our clients a personalized and comprehensive planning experience.

One of our highly successful and professional practice teams is expanding and looking to add a key member to their Surrey Office. They are looking to bring on an experienced Financial Planner / Tax Specialist to work alongside their six Planners in servicing their clients. This is a tremendous opportunity for a career-oriented person in the financial services industry looking to join a full-service financial planning practice that focuses on multi-generational family businesses, tax strategies and wealth management. This role also provides an opportunity for future partnership within the team. The successful candidate will be mentored to help develop more advanced advisory skills, with the goal of taking on the primarily client-facing role in the future. Preference will be given to applicants with a strong accounting/tax background in addition to a high knowledge of financial planning.

This is a full-time position with a competitive compensation and benefits package. Onboarding will be conducted from both the Surrey and Vancouver office. Following that work will be performed in Surrey office with only a recurring schedule in Vancouver 3-4 days a month thereafter. The job opening is immediate.

Duties & Responsibilities:

- Play an integral role as part of a team with the Financial Planners and administrators providing a seamless client service experience
- Attend client and prospect meetings with Sr. financial planners and independently
- Assist with referral generation, through professional, personal and client opportunities
- Engage clients on a regular basis by handling incoming and outgoing correspondence to provide client service & support
- Assist in the preparation of financial plans, portfolio and insurance reviews and income tax review ready for client presentation
- Ensure completion of all required materials and tasks before, during and after client meetings
- Liaise with the Administration team for form preparation, statement requests and other administrative requirements
- Liaise and assist with our client’s professional advisors including lawyers, accountants and bankers
- Active member of the Team’s Finance Committee

- Attend client, networking or industry events

Experience

- Minimum of ten years of related work experience in financial services, ideally 5 years in a client servicing role
- Preference given to someone who worked in wealth management
- Preference to someone with an accounting designation or tax background
- Working knowledge of investment and insurance products

Education/training

- Financial Planning designation (CFP, RFP or PFP) successfully completed or in progress
- Certified Public Accountant (CPA) achieved or a strong individual and business tax knowledge
- Mutual Fund active license or ability to be licensed
- BC Life Insurance license or desire to obtain

Skills & Abilities

- A highly-motivated individual with a willingness to learn through practical, technical and educational formats
- High interest in career development and taking on more primary advisory responsibilities
- Strong and professional communication skills both written and verbal
- Refined relationship building and sales skills
- Team oriented – Helpful, encouraging and supportive personality
- Understanding of back office procedures and compliance in a MFDA environment
- Experience using CRM software for tracking of client and prospect information, ideally SalesForce
- Strong computer and technical skills in a Windows/PC environment
- Highly proficient in Word, Excel and Outlook

Please submit a resume and cover letter. Thank you to all those that apply. Unfortunately, we will not be able to reach out to all applicants and will only be in contact with those that meet all the requirements of this position.